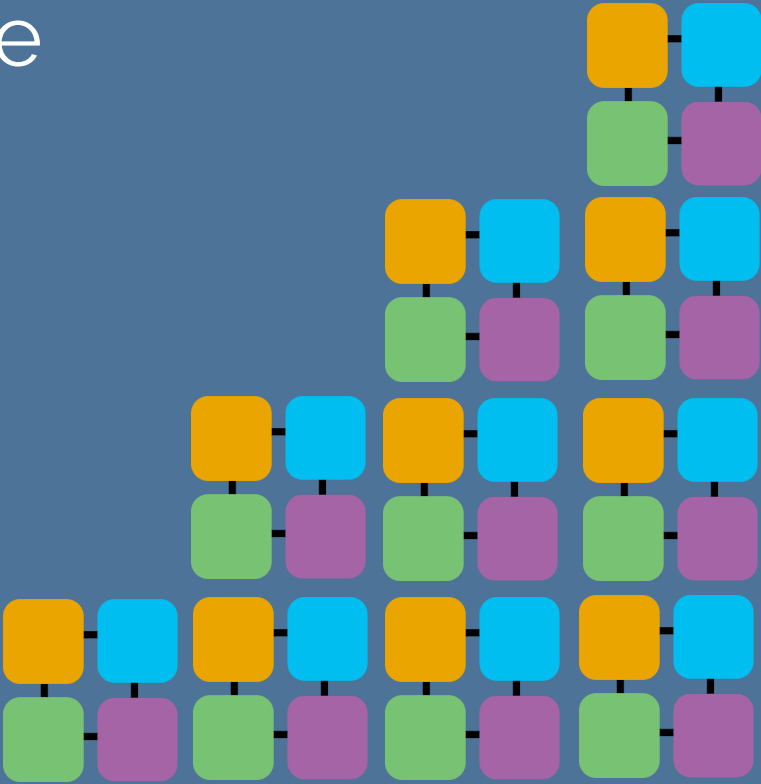


CASE STUDY

Bridging the Gap: Orion's Impact on Post- Merger Capital Planning in Healthcare



This case study examines how the Orion software transformed capital planning for a newly merged Midwestern healthcare giant, consolidating data from 1,000+ projects across 22 hospitals enabling real-time decision-making for a \$1B+ annual capital budget.

Key Outcomes

- Consolidated data from 1,000+ projects across 22 hospitals into a single platform
- Automated business intelligence reporting
- Improved forecasting methodologies
- Enabled real-time decision-making for \$1B+ annual capital budget

Client Overview

Our client is a leading healthcare system in the Midwest, formed through a significant merger in 2022. Key features include:

- 22 hospitals and over 300 outpatient locations across multiple regions
- Workforce of 64,000+, including 11,500+ physicians and 15,000+ nurses
- Four divisions covering different areas of a large Midwestern state
- Includes a renowned children's hospital and top-ranked facilities
- Focus on improving healthcare quality, accessibility, and cost-effectiveness

Challenge

Post-merger, the healthcare system faced several critical challenges:

1. Data fragmentation across multiple regions in different spreadsheets
2. Lack of a centralized platform for managing strategic and infrastructure projects
3. Inefficient reporting processes

These challenges hindered the organization's ability to make informed decisions and efficiently allocate resources across its extensive network.

Solution: Orion Software

Orion, a specialized software solution, was implemented to align healthcare resources with strategy through advanced analytics. Key features addressing specific client challenges include:

1. Centralized data management
 - Combats data fragmentation by creating a single source of truth
 - Enables seamless integration of data from merged entities
2. Automated business intelligence reporting
 - Addresses inefficient querying and reporting processes
 - Provides real-time insights for informed decision-making
3. Built-in capital forecasting capabilities
 - Facilitates comprehensive planning across strategic and infrastructure projects
 - Supports management of large-scale operations with predictive analytics
4. Customizable dashboards and user roles
 - Allows tailored access and views for different divisions and departments
 - Supports integration of various stakeholders in the planning process

Implementation Process

- Duration: 4 months
- Collaboration with architecture and engineering firms
- Bulk data upload from existing master strategic plan
- Integration of regional project data
- Infrastructure project data incorporation
- Training of approximately 12 team members

Results and Benefits

1. Data Centralization:
 - Consolidated data for 1,000+ projects into a single platform
2. Improved Efficiency:
 - Decreased time spent on data compilation
3. Comprehensive Planning:
 - Increased cross-departmental collaboration
 - Improved project prioritization, leading to better resource allocation
4. Enhanced Decision Making:
 - Enabled real-time scenario planning for \$1B+ annual capital budget
 - Improved forecast accuracy, leading to better financial planning
5. System Integration:
 - Seamlessly connected with existing software tools
 - Reduced manual data entry, minimizing errors and saving time

Unique Aspects of This Case

1. Scale of Implementation: One of the largest healthcare systems in the Midwest
2. Post-Merger Integration: Helped streamline data management following a significant merger
3. Comprehensive Approach: Addressed both strategic planning and infrastructure project management
4. Collaboration with External Partners: Worked alongside architecture and engineering firms for seamless integration

Conclusion

The implementation of Orion has transformed the healthcare system's capital planning processes. By providing a centralized platform for data management, automated reporting, and advanced forecasting, Orion has enabled the organization to overcome post-merger challenges and establish a foundation for data-driven decision-making. The significant improvements in efficiency, accuracy, and collaboration have positioned the healthcare system for strategic growth and enhanced patient care in an increasingly complex healthcare landscape.