



Case Study: GRIPA

Health Care Organization Gains Valuable Visibility into Clients with Tribridge and Microsoft Dynamics CRM®

BUSINESS SITUATION

As their organization grew and GRIPA offered more services, it became clear that a stable, flexible platform was needed to manage the data kept on each client. "The application we were using, which was designed using Microsoft Access, did the job it was built to do," said Kelly Taddeo, GRIPA's Provider Relationship Manager. "However, it lacked the flexibility we needed to grow our organization." Additionally, GRIPA needed to see data in a variety of ways, to track which employees were visiting which clients and to manage support calls. "The old system just did not fit our new business model," said Kelly.

GRIPA began its search for a flexible platform with the rich functionality they had grown accustomed to, plus additional tools to support their growth. Finding the right partner to support them also was of great importance. "We learned very quickly that what we needed was not typical. Any solution we would use required a lot of customization," said Ben Smith, GRIPA's Product Manager. "We found Tribridge and Microsoft Dynamics CRM through our research. We were impressed with the scalability and flexibility of Dynamics CRM and with the experience and expertise of Tribridge. Tribridge spent a lot of time learning our business before making any recommendations."

SOLUTION

Since GRIPA would not be using Dynamics CRM as a sales tool, but rather an xRM tool that could manage their member relationships, several fields had to be customized to match their terminology. For example, the "account" field would be relabeled "practice." "Tribridge created a proof-of-concept environment for us," said Ben. "No other company we interviewed proactively offered to do this. Tribridge did a great job tailoring Dynamics CRM to fit our business processes instead of changing our processes to fit a system. This resulted in rapid user adoption."

SOLUTION: Microsoft Dynamics® CRM

ABOUT GRIPA



Built on a strong foundation of collaborative partnership, Greater Rochester Independent Practice Association (GRIPA) was founded in 1996 and is a membership-based organization comprised of nearly 650 physicians and affiliate hospitals. The New York-based association provides its members medical, business and technology management services aimed at making better health care easier to deliver, less costly for patients and more rewarding for all involved.

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We help our customers become more productive, profitable, competitive and secure.

RESULTS

Complete Visibility

Fields were relabeled and processes modified to meet GRIPA's unique needs. Now, all client data resides in one place and GRIPA has complete visibility into each physician's office. They can easily view what services have been provided to each client and which clients GRIPA employees are visiting. "Having this visibility allows us to streamline our employees' and clients' time," said Kelly. "We have reduced duplicate travel time and provide better service for our clients. Also, since data is easily accessible and housed in one place, I can now pull up a client record to get the information I need instead of running a report. We also have the ability to see the relationships and affiliations of both physicians and practices."

Easier Reporting on a Stable Platform

Reporting is also easier with Dynamics CRM. "Dynamics CRM's SQL database allows us to create reports using data from both Dynamics CRM and data from other applications in the same report," said Ben. Not only can Dynamics CRM handle more data, the platform is more stable and the overall time spent supporting the system has been drastically reduced. "During peak times, we used to spend approximately 20 hours a week supporting the old system," said Paul Soto, GRIPA's IT Specialist. "That has been reduced to approximately two hours per month, which is primarily used to further customize the system. Dynamics CRM is very easy to support; it runs itself."

Faster Customer Service

The second phase of the implementation centered on service. "We implemented native Dynamics CRM functionality to manage cases, support tickets and the enhancement queue and integrated this with our client portal," said Ben. "Our clients can enter a support case in the portal and automatically it is routed to the appropriate queue and assigned to the person best suited to help with that particular issue." This ensures that all issues are properly tracked and taken care of, which has improved client satisfaction with shorter response times. "We have even used some of the marketing functionality to promote new client events," said Kelly. "The IT department has plans to use the service piece to track and prioritize internal IT requests."

Smooth Third-Party Enhancements

GRIPA also deployed two add-on applications from c360, a Microsoft approved third-party solution provider. One application allows non-Outlook users to share calendars and allows GRIPA to create recurring appointments. The second enhancement, Audit Analyzer, tracks any change made to CRM. "We can run a report for a specific page or field and see who changed it and when. This helps satisfy compliance requirements," said Ben.

Strong Platform for Web Portal

Supporting their mantra "health care could look like this," GRIPA is implementing a Clinical Integration program and has received a positive FTC opinion — the second ever given — on their program. The GRIPA Connect Web portal, a key feature of Clinical Integration, allows patient information from various data sources to flow freely and securely among participating physicians. This reduces the time needed to gather paperwork and reduces the need for duplicate tests or x-rays, which results in more rapid patient treatment and lower costs.

"Dynamics CRM is the basis for our service and support for the Clinical Integration initiative," said Ben. "A year ago, we would have never dreamed that we would use Dynamics CRM for this," said Ben. "We appreciate the partnership we have with Tribridge," said Ben. "We like that they have a local presence and the creativity of their consultants. We are a service company too, and we know how much our clients depend on us. Tribridge treats us the way we treat our clients, and we know we can depend on Tribridge."



SOLUTION: Microsoft Dynamics® CRM

THE RESULTS

- All client data resides in one place
- Better visibility into client services
- Employee and client time streamlined
- Enhanced reporting capabilities
- System support reduced to 2 hours/month
- Shorter response times for client support
- Duplicate tests or x-rays reduced (web portal)

WHY TRIBRIDGE?

- Proven experience in the health care industry
- Solid reputation with Microsoft
- Collaborative approach
- Fast response time
- Local presence

CONTACT TRIBRIDGE

Find out how Tribridge can help you simplify your business.

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