



trumpet

## CLIENT CASE STUDY AUTOMATED KPI DASHBOARDS

### AUTOMATION PROJECT RESULTS

- Daily, cross-departmental dashboards
- 40 hours/week of Executive time saved
- Appointment volume up by 20%
- Appointment revenues up by 40%

#### Goal: Improve Quality Measures

Wesley Community and Health Centers in Phoenix, Arizona serves approximately 7,000 patients per year from the city's most disadvantaged populations. Like most FQHCs, Wesley needed to improve access to care while managing costs. However, their leadership felt they were "flying blind" in knowing what clinical or operational changes to make, because the data that would drive those decisions was buried in different systems. It took so long to gather and consolidate their data into meaningful information, that the team didn't have a way to make decisions based on concrete information.

"Trumpet's automation has saved substantial executive and staff time, delivered the insights we needed, and enabled us to improve patient care, profitability, and our staff's work experience."

- Jason Rentschler, COO,  
Wesley CHC

#### Challenge: Lack of Data Visibility

Key members of Wesley's leadership - their CFO, COO, and a key manager - were spending over 40 hours every week running reports manually across five different applications: their accounting, electronic health records, phone system, HR, and quality measures data systems. There was insufficient time to run each

report every day, but running them less frequently led to mismatched data. There were still other reports they had no time to generate at all. In the end, Wesley's leadership had little trust in the data and lacked the time they needed to make decisions and create improvements.

#### Automated KPI Dashboards. Center-Wide Improvements.

Trumpet created automation that runs the reports the executive team needed and prepares them for import into Power BI for data visualization. The automation runs every report management needs, every night, including many that no-one previously had time to run, feeding Power BI dashboards that are up to date every morning. The team now has real time data - and the time to make decisions and operational changes. After 18 months, they had made the following improvements:

- Increased appointment volume by 20%
- Increased appointment revenues by 40%
- Increased HEDIS scores by a full star or more with key payers
- Cut referral times from 12 days to one
- Increased call center volume by 40%
- Improved key quality measures by ~20%
- Improved provider utilization while reducing burnout

Wesley achieved these results while adding new reports and dashboards internally, saving another 40 hours of staff time. They also promoted key staff members, and issued a bonus and a raise to all staff.