

## Case Study: Project Platmed

# BI Strategy Unifies Disparate Systems to Enhance Data-Driven Decision-Making

**Healthcare Platform company empowered its team with actionable insights by seamlessly integrating disparate systems during an intense acquisition period. Utilizing data and analytics, executive dashboards were created using Power BI to facilitate data-driven decision-making.**

### BACKGROUND

Project Platmed is a Private Equity funded Portco planning to acquire 500 clinics over the next 2-3 years to combine with their established platform operation.

Operating with a revenue exceeding \$30M annually and 2.5 million patient visits, its United States presence spans over 70 locations.

Project Platmed needed an approach that empowered its practice partners when navigating challenges associated with acquisitions while preserving clinical autonomy. This company needed to accelerate its integration process as they brought new companies onto their existing system.

### OBJECTIVE

Project Platmed had 2 distinct challenges:

1. The core IT SaaS platform systems lacked the decision-making intelligence required to meet internal and PE stakeholder standards without resorting to costly and frequent modifications. The BI initiative enhanced decision-making around the core system they built their platform on, eliminating the need for excessive and continuous modifications of the SaaS platform they were using.
2. During the post-acquisition phase, before new clinics systems were integrated into the platform, performance visibility was severely limited for 6-12 months, leaving new acquisitions to resort to extensive manual tracking and reporting. The BI solution seamlessly integrated these legacy clinic systems, enabling the entire organization to deliver operational and decision metrics consistently, regardless of the system in use.

## THE TECHNICAL CHALLENGES

1. **Integration Challenges:** Merging diverse systems is a complex process, due to variability in data formats and standards of disparate IT systems.
2. **Scalability Challenges:** Adapting data systems to handle large volumes resulting from operational expansion is crucial. It involves ensuring that the data infrastructure is compatible and can scale effectively.
3. **Data & Quality Governance:** Addressing data quality discrepancies between acquiring and acquired entities involves aligning governance policies for consistency.
4. **Cost & Resource Allocation:** Managing budgetary constraints for integrating and upgrading data systems, while ensuring adequate human and technological resources for a smooth transition.
5. **Legacy Systems & Technology Debt:** Legacy systems from acquired practices may need upgrades or replacements. Additionally, addressing accumulated technical debt is crucial for effective data management.





NPS score improved  
by 39%



Patient acquisition  
cost (PAC) reduced  
by 16.7%

## THE SOLUTION

An end-to-end platform was designed on top of a Data Warehouse hosted in Microsoft Fabric's OneLake, leveraging Power BI for executive dashboard visualization. Our team focused on:

1. Rapid data ingestion from new systems and various data sources (file, blob, RDBMS, Excel).
2. Empowering business users with self-service analytics for quicker decision-making and customizable insights.
3. Establishing a single source of truth for analytics and AI functions, thus expediting decision-making.
4. Easier development, testing and deployment of ML models, on the same dataset which is used to derive insights.

## THE OUTCOME

- **Persona-Based User Experience Improvements:** Orthodontists' *NPS score improved by 39%* as they could track and monitor treatment outcomes, identify anomalies, and ensure adherence to quality standards.
- **Credible Data Foundation to Fuel Growth:** *Patient acquisition cost (PAC) decreased by 16.7%* due to trusted data & insights about patient demographics, existing patient acquisition costs, target market, historical trends, and service feedback.





7% decrease in IT costs, infra, & maintenance costs



50% decrease in time required for accounts reconciliation

- **Trends And Forecasting:** Easy access to historical data enabled practices to analyze past trends and forecast seasonal demand surges across different dimensions, resulting in a 2.3% *cost reduction* via resource optimization.
- **Unifying the Capabilities:** A robust, scalable, and unified design using Microsoft Fabric established a foundation for organization-wide data initiatives, resulting in a 7% *decrease in IT, infrastructure and maintenance costs*.
- **Faster Time To Value, But Cheaper:** Near real-time data availability for the accounts and revenue department dramatically reduced the time required for monthly *accounts reconciliation by over 50%*.

#### ABOUT RKON

Since 1998, RKON has helped private equity and enterprise firms go from vision to execution and achieve "Quiet IT," where IT seamlessly serves the business strategy versus getting in the way of execution. Our team, headquartered in Chicago, IL, has developed a refined approach with over 25 years of experience. We deliver a clear vision of scalable, agile, secure, cost-optimized and low-risk end state. RKON provides IT solutions in three stages: first building an advisory practice that sends the strategy in the right direction; an execution practice that ensures the vision is turned into reality; and a management practice that keeps the vision on track as IT evolves to best serve the business.