

SCALE Case Study

# MSO Formation and Integration

## Client Profile

**Size**

52 locations

**Location**

CA, AZ, NM, NV

**Specialty**

Dental

## Services Deployed



**Revenue Cycle Management**



**IT Systems Strategy & Implementation**



**MSO Operation**



**Human Resources**

## Overview

Our Client completed a sizable acquisition expanding their footprint in additional states. The Company had not completed a transaction of this size previously and was seeking support to develop a holistic integration strategy across core functional areas. Further, the Company was experiencing specific pain points in its current IT and RCM departments and was seeking guidance on how to address these pain points and how to develop the right integration strategy in the context of these pain points.

*Specifically, the acquiring Company's EMR architecture was structured as individual on-premise instances for each clinic location. Integrating the target into this environment would present performance challenges and yet changing the acquiring company's EMR infrastructure was both complex and delicate.*

## Execution

7 SCALE team members were deployed throughout the engagement including team members across:

- + DSO domain team
- + HR
- + RCM
- + IT
- + Data analytics
- + Project management

- + SCALE defined and developed strategies for a holistic range of integration workstreams
- + We evaluated opportunities for DSO service centralization, workflow standardization, systems consolidation and cost savings

SCALE provided centralized integration execution project management for process status tracking and status transparency in addition to specialized domain expert integration execution oversight across key functional areas including:

- + RCM
- + IT
- + HR
- + Operations
- + Call center
- + Data analytics

We support the evaluation of various alternatives for addressing key operational & platform scaling needs and challenges to support the Company's larger pro forma footprint such as:

- + RCM performance workflow automation
- + IT / EMR architecture

SCALE used a holistic, multidisciplinary approach leveraging our deep functional domain expertise specific to comparable healthcare platforms across all core functional areas to collaborate with, advise and support Client's leadership who had not previously been through a sizable integration process before.

## Execution Timeline

### Phase 1 ~1 month

- + Current state structure workflow and performance evaluation across both acquiring and target companies

### Phase 2 ~4 months

- + Integration execution
- + ~4 months to achieve substantial integration across core phase 1 integration objectives

## General Results

- + SCALE achieved substantial completion of key phase 1 integration objectives within 5 months of kick-off including the assessment phase
- + We empowered and reduced confusion across management team who had not previously been through a sizable integration process before
- + Improved post-close communication across management teams from the acquiring and target companies, as well as heightened integration execution accountability
- + Facilitated holistic integration process status transparency for department leadership, C-suite and Board
- + Thoughtful, informed, systematic, analytical and transparent decision-making around key decisions
- + Highlighted key performance improvement needs and opportunities within RCM that brought heightened transparency, accountability and structure to addressing these opportunities

## Department Results

### Human Resources

- + Developed and rolled out revised mission, vision values across the pro forma organization
- + Developed a pro forma talent recruitment program structure across expanded geographic footprint with a hybrid model of centralized oversight and local market representation
- + Standardized / integrated core HR operations and team structure

### Call Center

- + Supported feature / cost evaluation of call center software solutions, as well as business plan for centralizing call center operations across the various geographic markets

## Information Technology

- + Developed pro forma enterprise EMR architecture strategy to remediate legacy performance issues and integration objectives
- + Completed a comparative financial model, features evaluation, and operational and executive stakeholder needs analysis of current state architecture relative to various potential alternative scenarios
- + Developed a recommended plan for remediating base business IT performance issues
- + Defined a regional EMR architecture / consolidation strategy
- + Developed a strategy for migrating the acquiring company to a pod-level cloud-based environment to mitigate the challenges with the Company's legacy individual EMR instance per clinic site
- + Supported restructuring and centralization of IT team
- + Structured and oversaw base IT program integration

## Revenue Cycle Management

- + Developed pro forma org chart
- + Brought clarity, specificity and transparency to key hiring needs to overcome current state performance improvement needs & system challenges until these challenges were remediated
- + Identified payment posting automation performance improvement opportunity within acquiring company and accelerated pathway for achieving
- + Developed a plan for migrating the target company away from an outsourced payment posting solution to achieve cost savings