

An Internal Platform to Manage a Scale up Corporation

PT Solutions Physical Therapy is a privately held practice based in Atlanta, Georgia, with more than 450 locations across 25 states. For six consecutive years, PT Solutions has earned a spot on the Inc. 5000's list of fastest-growing private companies. This success is driven by its unique model of hospital partnerships, private acquisitions, and new clinics.

Managing rapid growth and navigating a pandemic has required resilience, ingenuity, and the push for real-time data to leverage within operations. PT Solutions traditionally relied on labor-intensive data gathering from multiple applications and EMRs, which were then consolidated into spreadsheets. Recognizing the inefficiencies and limitations of this approach, leadership saw an opportunity to develop a streamlined enterprise platform to enhance analytics and processes, making real-time data accessible across tablet and mobile devices. Management at various levels would now have access to near real time insights to make better informed decisions.



THE WHAT

An Enterprise Level Scalable Framework for Real-time Data Capture, Analysis and Reporting

Over the last 20 years, PT Solutions has grown from a single clinic in Alabama to over 400 locations. This successful expansion is a true testament to the organization's hard work and perseverance in improving performance. PT Solutions treats patients in various facilities, from modern stand-alone clinics to large hospital campuses, each with differing network and computing capabilities. Recognizing the need for real-time, actionable data, leadership realized they needed to develop a custom tool to reduce their decision horizon from wider time ranges to as close to real-time as possible.



A Single-Source for Data and Reporting

As with any rapidly growing and innovating organization PTS has a wide variety of applications in use. While this allows the use of the "best tool for the job" it also creates an environment with distributed data. Operating at scale requires integrated systems and a unified data and reporting platform.

Building an integrated data capture and reporting platform offered several unique benefits. For the first time, PT Solutions would have a single enterprise platform accessible to all employees in all clinics, measuring not just performance but also compliance, and even include the absence of data as a reportable metric.



PT Solutions Partners with Parux to Develop a New Internal Ecosystem

PT Solutions initially engaged Parux for a discovery phase. Parux's team of developers, data specialists, and user experience designers conducted thorough research to identify where data was stored and to prioritize key initiatives. This collaboration led to the vision of a company-centric platform.

As an agile development firm, Parux was able to jump right into the product build, leveraging the best standard product management methodologies to make an immediate impact. Parux and PT Solutions jointly designed and developed the new enterprise platform to consolidate data from multiple sources, ensuring trusted real-time information. This approach not only accelerated the development process but also ensured that the platform met the evolving needs of PT Solutions. Parux delivered an enterprise-ready MVP in eight months.



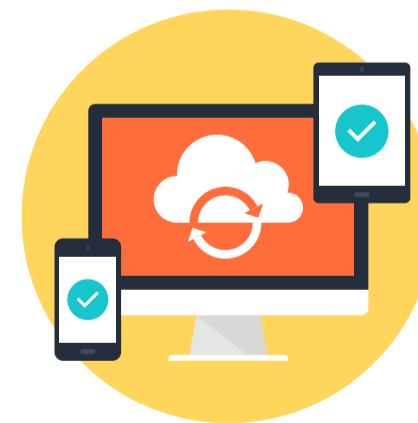
Ideation



UX Design



UI Prototyping



Data Management



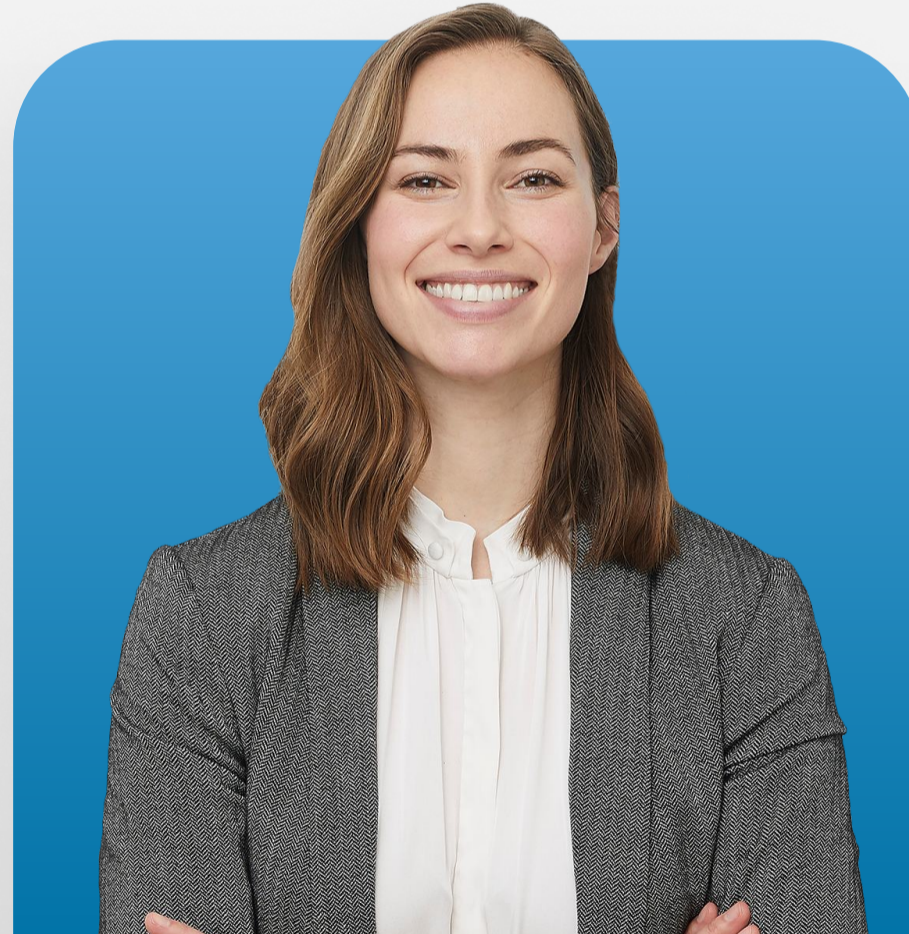
Development

Key Users to Learn From (Empathy)

Parux kicked off our engagement with PT Solutions by conducting an intensive series of interviews with key employees, including senior leadership, department directors, and clinic staff. We gained valuable insights into their roles, responsibilities, and pain points. Despite the diverse needs of over 3,000 employees, we successfully categorized them into three main personas and several sub-personas, ensuring a comprehensive understanding of their unique requirements. This approach was key to building user empathy, allowing us to tailor the platform to address specific challenges and enhance user experience effectively.



Senior Leader



Director



Clinic Staff

THE SENIOR LEADER

Meet Jonathan

Jonathan is part of the senior leadership team. He is responsible for a large part of the business where has a support staff that gives him weekly reports on clinic performance. He reviews these excel reports and tries to lead his team into making the right business decisions.



PERSONALITY

Tech Savvy



Analytics Centric



Open to Innovation



Organization



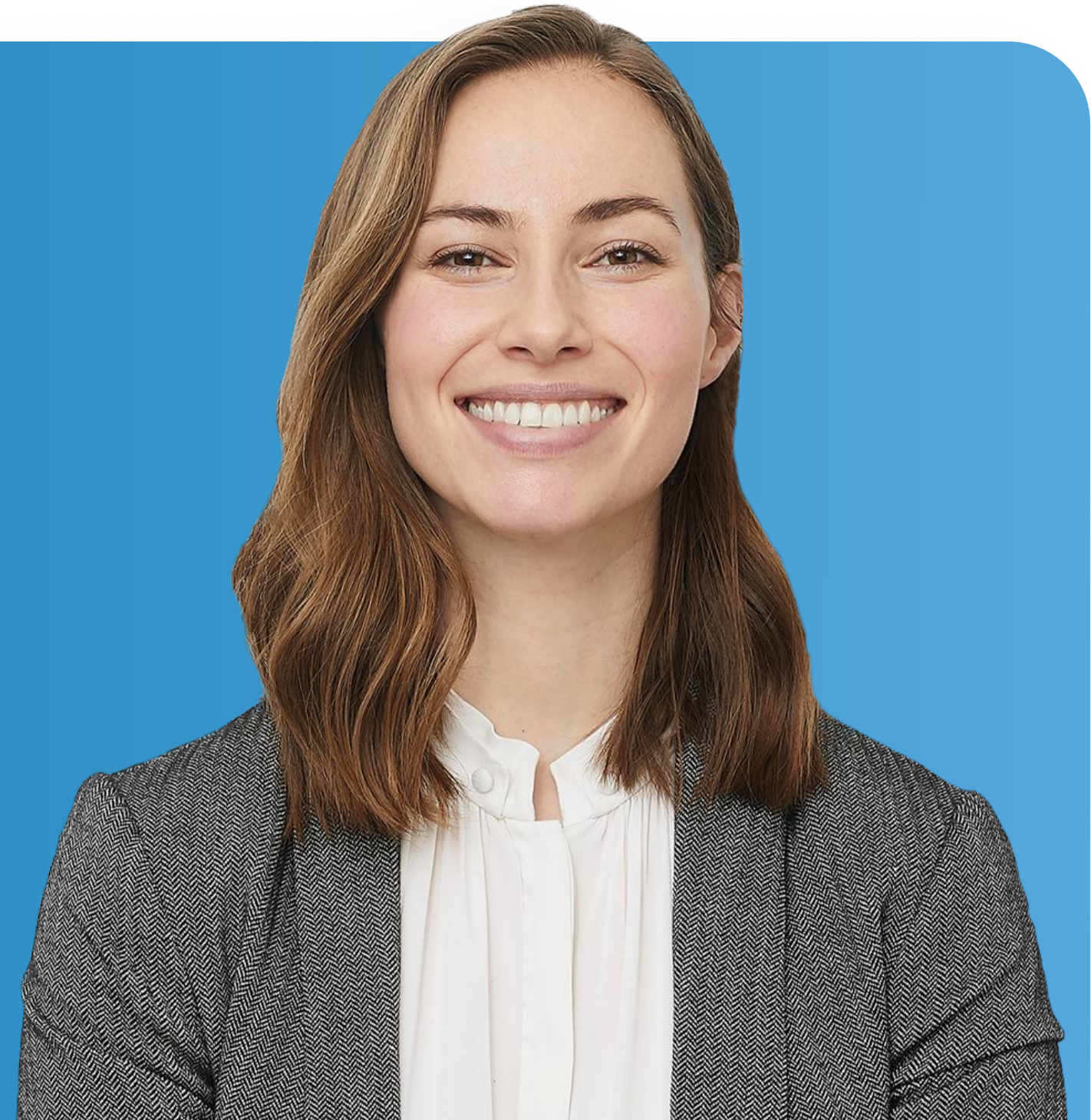
PAIN POINTS

- Does not have the ability to run his own reports at any time.
- Sometimes questions the accuracy of data based on data-entry lag and errors.
- Would like real-time data-visualizations in mobile reports instead of spreadsheets.

THE DIRECTOR OF DISTRICT OPERATIONS

Meet Katie

Katie is a Director of District Operations where she is in charge of the day-to-day management of a set of clinics. Analyzing performance of these clinics, and its staff, is a key responsibility for this role. She routinely has to look at key volume metrics in various platforms to report up to leadership and down to clinic staff.



PERSONALITY

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Organization



PAIN POINTS

- Time consuming process to digest reports weekly.
- Wishes she had more time to do actual analysis on performance.
- Has to constantly deal with data lags from clinic data entry.

THE CLINIC STAFFER

Meet Abby

Abby is a Patient Scheduling Coordinator (PSC) who is responsible at the clinic location on welcoming guests, scheduling patients, and other front-office tasks. Along with the physical therapists, Abby is tasked with entering the number of visits, evaluations, and billable units into a reporting platform.



PERSONALITY

Tech Savvy



Analytics Centric



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Organization



PAIN POINTS

- Hard to coordinate data between all team members.
- Time consuming and repetitive to enter in clinic numbers every day.
- Wishes there was more training support on entering data into various platforms.

How Can PT Solutions Improve Organizational Reporting?

As organizations expand, they often struggle to balance the agility of a startup with the structure of a successful full-scale enterprise. PT Solutions faced these challenges while expanding at an amazing rate. Transitioning from an early-stage startup, the company struggled to move beyond a "just get it done" mindset. PT Solutions' reporting structure was fragmented, leading to inefficiencies such as:

- Data capture delays.
- Inaccurate and unreliable performance metrics.
- Knowledge silos and fragmentation.
- Lengthy and inconsistent training periods.

Introducing Elevate



Elevate was created to guide reporting for PT Solutions from scrappy startup to mature organization. By building their own central data application, PT Solutions could start consolidating processes and data into one platform.

Crawl

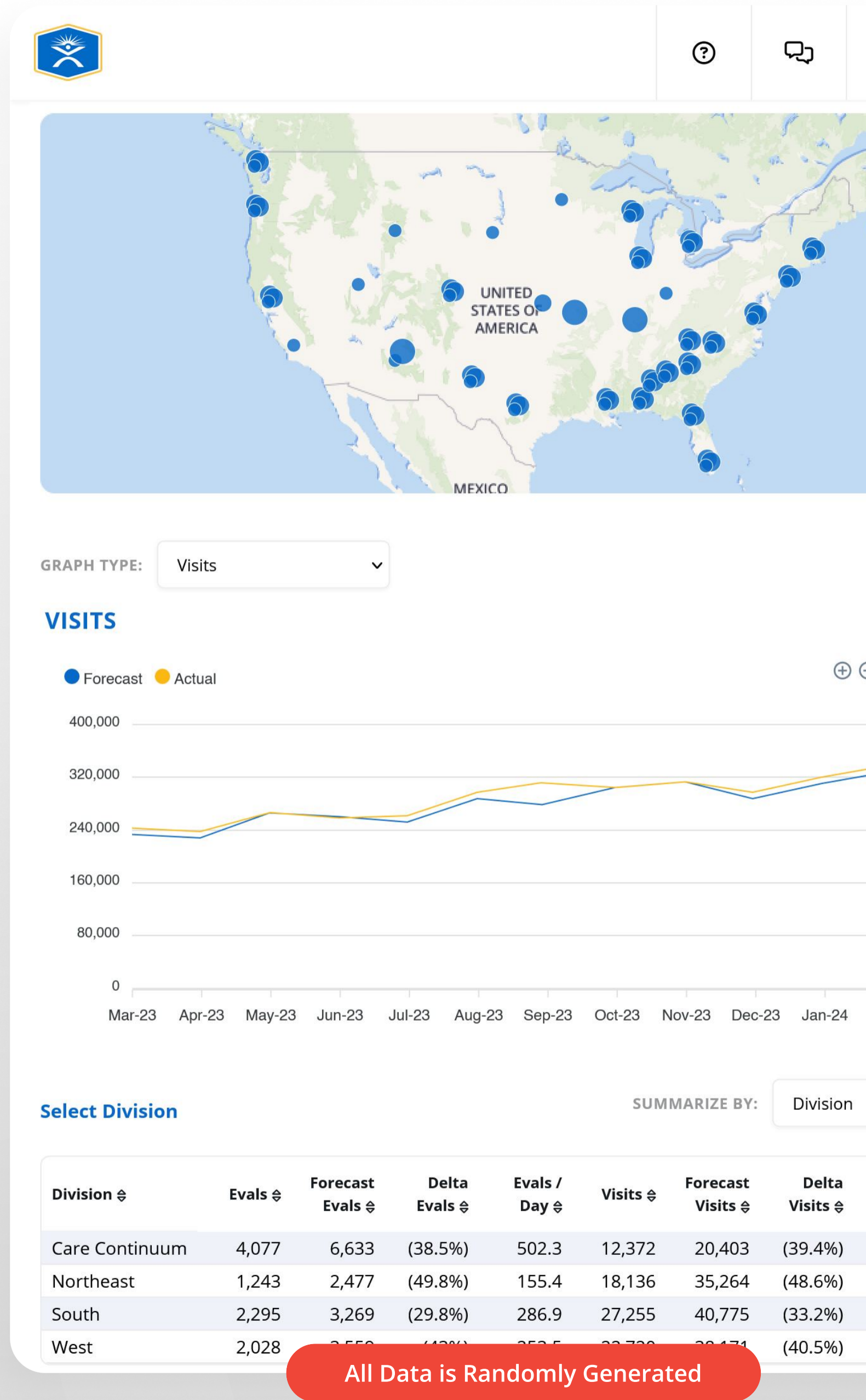
Design and develop the basics of a data capture application. Without the data, you can't make analytical decisions.

Walk

Select key SaaS applications to move into a company owned asset. This lowers cost over time and reduces new employee onboarding.

Run

Advanced collaboration and reporting across the practice in real-time. This helps facilitate better and faster decisions.



All Data is Randomly Generated

Evaluating the State of Data

Once user interviews and personas were complete, we evaluated the current state of PT Solutions' data. This included in-depth discovery of current processes which unveiled where different data existed. Working sessions were scheduled with directors and managers to review the current flows for compiling data and creating reports.

We learned there was a tremendous reliance on Excel and SharePoint for collaboration. There was also latency on data entry, and questions of accuracy and reliability of the entered data. PT Solutions had built some internal applications to manage certain data sets, but they were not connected to other applications.

A final report and presentation were created for PT Solutions outlining our recommendations. This included designing and developing key features of organizational reporting that would become the backbone of PT Solutions' data. Without these data sets, other features would lack the same real-time data needed to succeed.



One, Central Master Clinic List

One of the core features of Elevate needed to center around the Master Clinic List (MCL). The MCL was one of the data sets that was managed by an application built by PT Solutions. Unfortunately, it was detached from other data. So, the creation of performance reports across clinics required a hands-on process by the finance team. By re-designing in Elevate, PT Solutions now has a more sophisticated user experience and interface that allows for quicker management of clinics with KPIs tied directly into clinic details. The design process started with user interviews and wireframing. Once reviewed, full-fledge responsive prototypes were created and delivered to the development team.

MASTER CLINIC LIST
MISSOURI REGION / ST. LOUIS DISTRICT

Status: Active, Discontinued x Manage Filters

OFFICE NAME / ID	STATUS	OFFICE TYPE	CONTRACT / AFFILIATE	DISTRICT & REGION	SCORE	EVALS	VISITS	UNITS	LAST DATA	ACTIONS
Apple Hill Code: 001	ACTIVE	Satellite	Apogee Health St. Louis Hospital West	Missouri St. Louis	A 93.5%	↘ 12.4%	↗ 9.0%	↗ 6.5%	1 Day Ago	👤 📄 ➔
KEY PEOPLE: Aaron Adams DIRECTOR OF SALES Teri Williams CLINIC MANAGER										
Azer East	ACTIVE	Satellite	Faith Medical Faith Memorial Hospital	Missouri St. Louis	A 93.5%	↘ 5.4%	↗ 4.5%	↗ 2.4%	2 Day Ago	👤 📄 ➔
Azer West	ACTIVE	Satellite	Faith Medical Faith Memorial Hospital	Missouri St. Louis	C 73.5%	↘ 21.2%	↘ 16.4%	↘ 17.3%	1 Week Ago	👤 📄 ➔
Benton	ACTIVE	Satellite	Faith Medical St. Louis Hospital West	Missouri St. Louis	B 83.5%	↘ -3.2%	↗ 4.4%	↗ 2.3%	1 Day Ago	👤 📄 ➔
Drake Central	ACTIVE	Contract OP	Apogee Health St. Louis Hospital West	Missouri St. Louis	B 83.5%	↗ 8.1%	↗ 4.1%	↗ 2.3%	1 Day Ago	👤 📄 ➔
Drake-Pine	DISCONT.	Contract OP	Apogee Health St. Louis Hospital East	Missouri St. Louis	A 93.5%	----	----	----	1 Day Ago	👤 📄 ➔
Francis Park	ACTIVE	Satellite	Apogee Health St. Louis Hospital East	Missouri St. Louis	B 83.5%	----	----	----	1 Day Ago	👤 📄 ➔
Holly Park	ACTIVE	Private	Faith Medical Faith Memorial Hospital	Missouri St. Louis	B 83.5%	----	----	----	1 Day Ago	👤 📄 ➔

All Data is Randomly Generated

MASTER CLINIC LIST

Apple Hill
Code: 456

OFFICE TYPE: Satellite ACTIVE

CONTRACT / AFFILIATE: Apogee Health St. Louis Hospital West
REGION & STATE: Missouri St. Louis

Score: A 93.5%

Evals: ↗ 12.5% Visits: ↗ 15.3%

Units: ↗ 7.5% DATA: ↘ 12.1%

1 Day Ago

Azer East
Code: 693

OFFICE TYPE: Satellite ACTIVE

CONTRACT / AFFILIATE: Faith Medical Faith Memorial Hospital
REGION & STATE: Missouri St. Louis

Score: A 91.3%

Evals: ↗ 11.5% Visits: ↗ 8.3%

Units: ↗ 5.2% Units: ↗ 13.2%

1 Day Ago

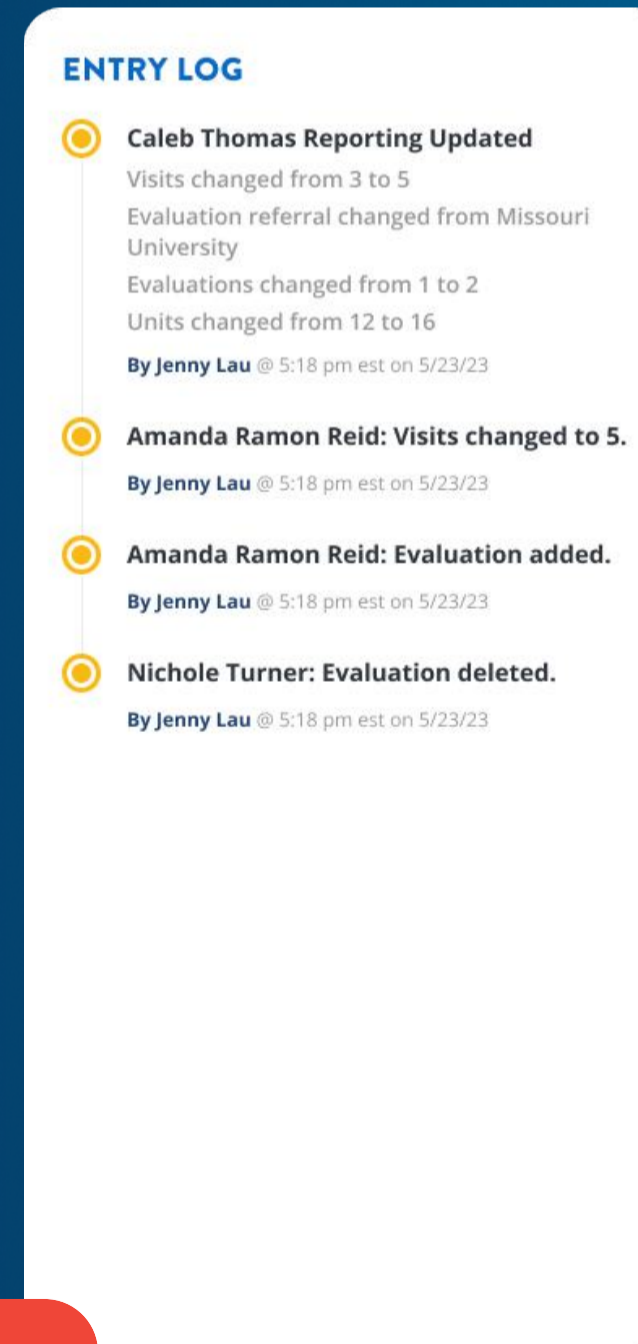
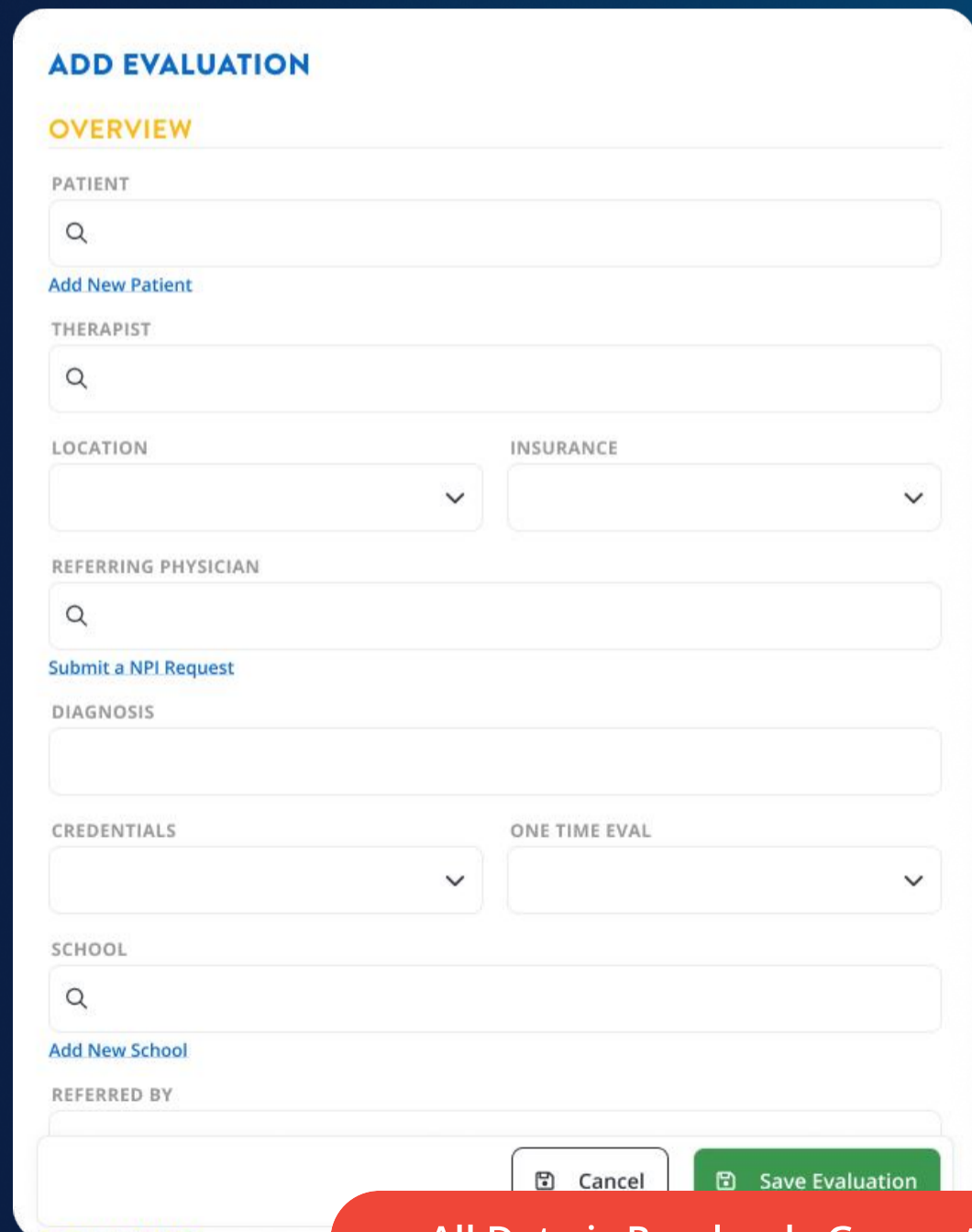
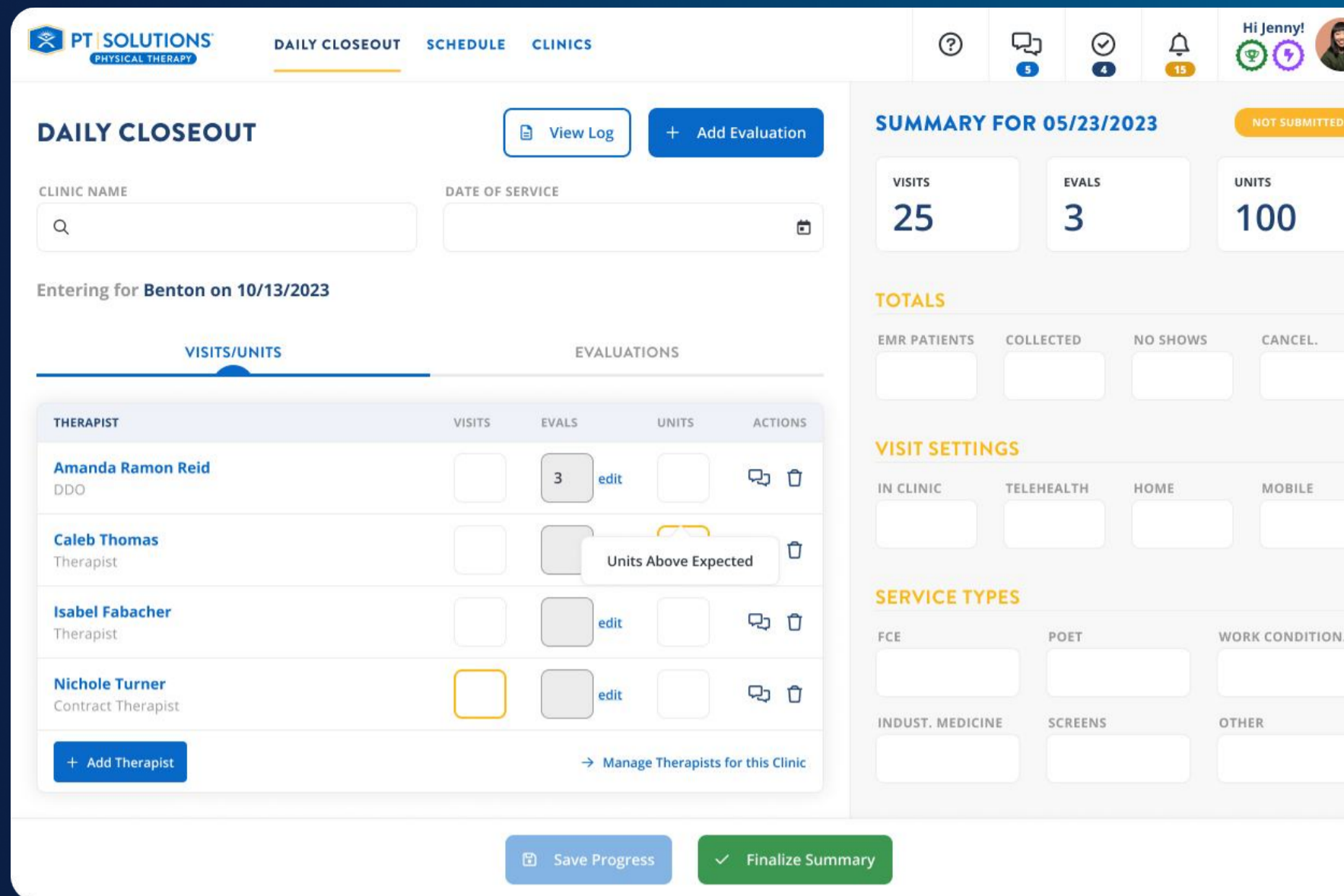
FEATURE HIGHLIGHT

An Improved Daily Closeout

Another key feature built for the initial release was the Daily Closeout. Every day, at every clinic, a Patient Scheduling Coordinator (PSC) is responsible for reporting the previous day's visits, evaluations, and billable units. Like the previous MCL, the Daily Closeout was a standalone app with a poor user experience that didn't connect to any other data set.

In Elevate's Daily Closeout, we set out to improve the user experience to decrease entry time, provide safeguards against entry errors, and transparency on when entries were complete. One major change was to use automatic tallying of entries. The previous application did not do this so the PSC had to manually calculate totals. We also designed a logging system to increase accountability.

The biggest win in combining the Daily Closeout and MCL is that KPIs are now connected to clinics in near real-time.

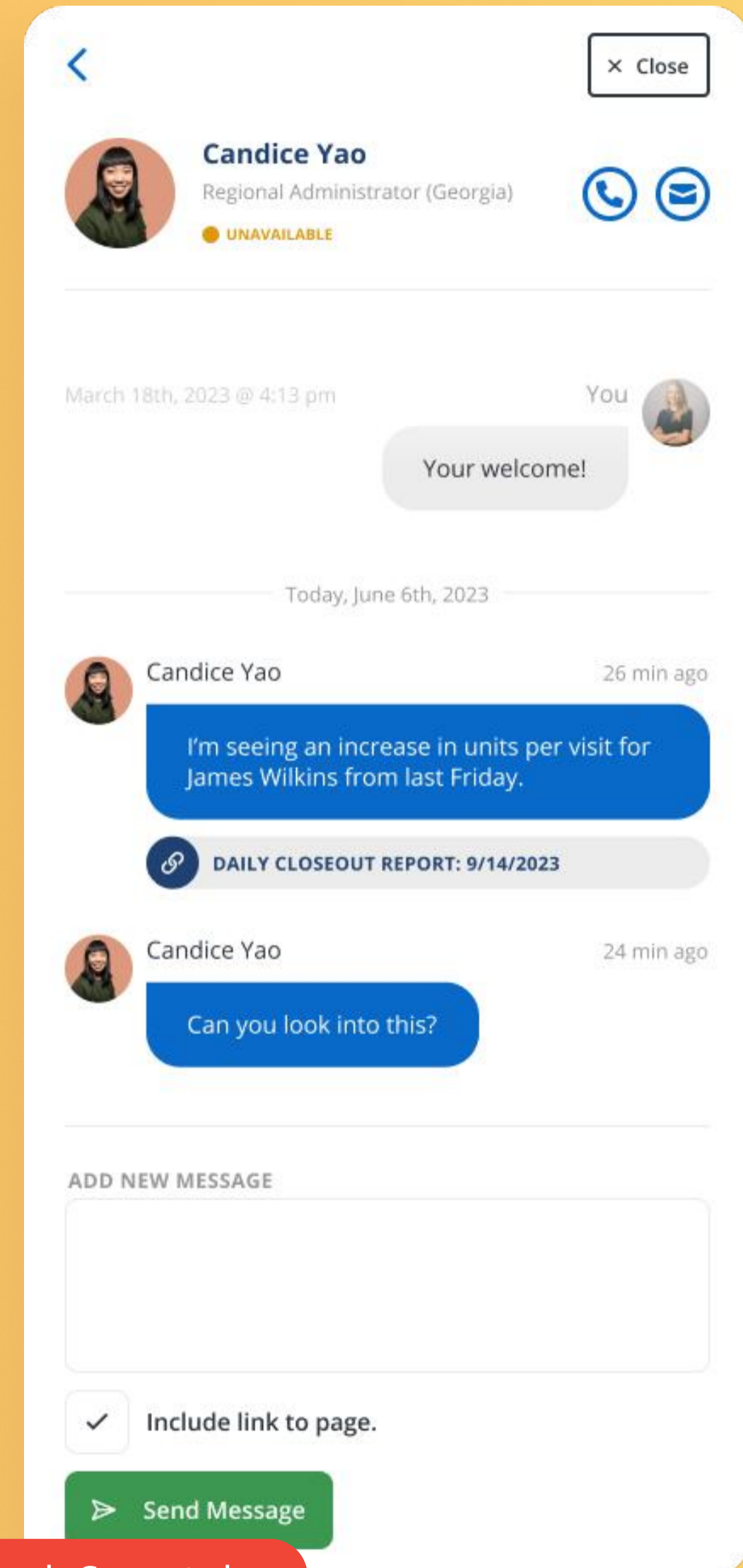


All Data is Randomly Generated

FEATURE HIGHLIGHT

Improved Comms Through In-App Messaging

A key goal PT Solutions' leadership identified was to improve organizational communication. With over 3000 employees, the current data sets on staffing were not accurate and not easily available. The Parux team helped PT Solutions ideate on a communications feature and settled on an in-app messaging solution. By building 1-1 messaging in the platform, team members can pull up a clinic record and reach out directly to a staff member with a single click.



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An Elevated Platform for Organizational Reporting

KEY RESULT

- Still an active project, Leadership now has near real-time reporting on clinics. This is something they have wanted for years, and are looking forward to expanding the reporting sets in upcoming quarters. In addition, feedback on the new Daily Closeout user interface has been overwhelmingly positive. Deployed in all clinics, clinic and data entry teams are excited for the streamlined entry process and data entry error checks.

Thank you to the Elevate team and the finance team for getting Elevate up and running and moving toward the functionality that we are now experiencing. I know it will get even better but being able to see a slice of April already with relatively clean data is awesome. Thank you for the perspective, diligence and moving the project and results forward. This tool has and will continue to have a major impact on PT Solutions operations and our current and future success.

Dale Yake

CEO/Founder PT Solutions Physical Therapy

