



## Case Study: How a Behavioral Health Organization Modernized Alumni Program Operations with Salesforce

A behavioral healthcare organization focused on providing treatment and recovery support services for individuals navigating mental health, eating disorder and substance use challenges recently partnered with DecisivEdge.

They wanted to modernize and standardize its alumni engagement operations.

Prior to the engagement, alumni outreach and follow-up activities were managed primarily through spreadsheets, and this reliance on manual inputs created disconnects, operational inconsistencies, and limited reporting visibility.

Using Salesforce, DecisivEdge helped this behavioral health organization centralize alumni data, automate follow-up workflows, standardize coordinator activities, and introduce foundational reporting capabilities. The initiative established a more organized and scalable framework for managing alumni engagement activities.

### CHALLENGE

This behavioral health organization's alumni program operated largely through manual coordination and disconnected tracking methods such as spreadsheets.

This meant the organization faced several operational challenges:

- Alumni engagement activities were tracked inconsistently across coordinators
- Follow-ups relied heavily on manual outreach and personal processes
- Data was maintained in spreadsheets and fragmented systems
- There was little standardization across alumni engagement workflows
- Leadership had limited visibility into engagement activities and outcomes
- Coordinators lacked centralized dashboards or structured task management
- There was no automation supporting post-discharge engagement journeys

As the organization continued to grow, the limitations of the manual process would become increasingly difficult to scale.

## SOLUTION

To guide the transformation, DecisivEdge aligned the engagement to an 'Alumni Program Maturity Model' designed to help organizations evolve from fragmented, manual alumni management processes into more centralized and scalable operational frameworks.

At the beginning of the engagement, the organization operated in a largely ad hoc environment with manual tracking, limited visibility, inconsistent outreach processes, and little automation.

DecisivEdge implemented a Salesforce-based alumni engagement solution designed to centralize alumni operations and improve post-discharge engagement management.

The solution focused on creating repeatable, standardized workflows that could be consistently used across the organization.

- **Centralized Alumni Management:** A centralized Salesforce environment was established to consolidate alumni information, engagement history, follow-up activities, and coordinator workflows.
- **Automated Follow-Up Workflows:** The new process introduced workflow automation tied to discharge events.

When a patient was discharged and identified as an alumni candidate:

1. Follow-up workflows were automatically initiated
2. Scheduled engagement activities were created
3. Coordinators received task reminders for outreach activities
4. Follow-up timelines were standardized across the organization

- **Guided Coordinator Activities:** DecisivEdge also implemented workflow-driven task management within Salesforce.

Coordinators gained visibility into:

1. Daily outreach responsibilities
2. Scheduled follow-up activities
3. Alumni engagement timelines
4. Standardized interaction processes

- **Foundational Reporting and Visibility:** The implementation introduced basic reporting and dashboard capabilities to improve operational oversight.

Leadership gained improved visibility into:

1. Alumni engagement activities
2. Follow-up completion status

3. Coordinator workflows
4. Overall process consistency

## RESULTS

The Salesforce implementation helped the organization transition from a fragmented and manually managed alumni engagement process to a more centralized and standardized operational model.

Following the implementation, the organization established:

- Improved consistency in post-discharge engagement processes
- Greater operational alignment across alumni coordinators
- Reduced reliance on disconnected spreadsheets and manual tracking methods
- More structured and repeatable outreach workflows
- Foundational reporting visibility into engagement activities

The implementation also provided coordinators with clearer visibility into daily outreach responsibilities and engagement timelines, helping create a more structured and repeatable operational process.

Looking ahead, the organization now has a stronger foundation for expanding reporting, engagement measurement, and implementing those learnings over time.

### ABOUT DECISIVEDGE

DecisivEdge leads organizations through their transformation journey. We believe that the right mix of people, processes, and technology will drive modernization, business optimization and automation. To learn more, please visit our website at [www.decisivedge.com](http://www.decisivedge.com), email us at [getresults@decisivedge.com](mailto:getresults@decisivedge.com) or contact us at 302.299.1570.

\* CASE STUDY \*