



Case Study: How a Behavioral Health Organization Streamlined Outpatient Scheduling with Salesforce

A behavioral health organization focused on providing treatment and recovery support services for individuals navigating mental health, eating disorders and substance use challenges, partnered with DecisivEdge to modernize and streamline its outpatient scheduling operations.

Prior to the engagement, outpatient scheduling activities relied heavily on manual coordination, disconnected spreadsheets, and fragmented scheduling visibility across teams. Coordinators often needed to reference multiple sources to identify appointment availability, manage scheduling requests, and coordinate communications.

Using Salesforce, DecisivEdge implemented a centralized outpatient scheduling framework designed to simplify appointment coordination, standardize workflows, and improve scheduling efficiency.

The initiative established a more organized and scalable scheduling process while laying the groundwork for future reporting, operational visibility, and performance measurement.

CHALLENGE

Before the engagement, the behavioral health organization's outpatient scheduling process relied heavily on manual coordination and disconnected scheduling methods. This created several challenges:

- Scheduling activities required coordinators to reference multiple spreadsheets and scheduling sources
- Appointment coordination depended heavily on manual communication between teams
- Scheduling visibility was fragmented across programs and facilities
- Coordinators lacked centralized access to appointment availability
- Scheduling workflows varied across users and teams
- Manual processes increased administrative complexity and slowed scheduling activities
- Operational visibility into scheduling workflows was limited

As outpatient operations continued to grow, the manual scheduling process became increasingly difficult to scale efficiently.

SOLUTION

DecisivEdge implemented a Salesforce-based outpatient scheduling framework designed to centralize scheduling workflows and simplify appointment coordination.

The solution focused on creating a more unified scheduling experience that reduced dependence on fragmented spreadsheets and manual coordination.

- **Centralized Scheduling Visibility:** The implementation introduced a more streamlined scheduling process designed to simplify appointment selection and coordination.

Using a centralized workflow within Salesforce, coordinators could:

1. View appointment availability more efficiently
2. Schedule appointments through a centralized process
3. Reduce manual coordination between teams
4. Improve consistency in scheduling activities
5. Reduce dependence on disconnected spreadsheets and individual scheduling methods

The updated process created a more organized approach to appointment coordination and scheduling visibility across teams.

- **Automated Scheduling Communications:** The solution introduced workflow-driven communications associated with scheduling activities.

Scheduling actions could trigger:

1. Notifications to facilities or care teams
2. Appointment-related communications
3. Follow-up scheduling activities
4. Standardized coordination workflows

- **Foundational Operational Visibility:** The scheduling solution also introduced foundational visibility into scheduling activities and operational workflows.

Leadership and coordinators gained improved visibility into:

1. Scheduling workflows
2. Appointment coordination activities
3. Operational scheduling consistency
4. Centralized scheduling processes

RESULTS

The Salesforce scheduling solution helped the organization transition from a fragmented and manually coordinated scheduling process to a more centralized and streamlined operational model.

Following the implementation, the organization established:

- More structured outpatient scheduling workflows
- Improved visibility into appointment coordination activities
- Reduced reliance on disconnected spreadsheets and manual coordination
- Greater operational consistency across scheduling activities
- A more centralized scheduling process for coordinators
- Improved alignment between scheduling teams and operational workflows
- Reduced dependency on individual scheduling knowledge and manual calendar interpretation
- A more repeatable and standardized scheduling process across teams

The initiative also established a stronger operational foundation for improving scheduling consistency and operational visibility.

As the organization continues evolving its outpatient operations, this centralized structure provides a stronger foundation for future operational enhancements and reporting capabilities.

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, email us at getresults@decisivedge.com or contact us at 302.299.1570.

* CASE STUDY *