

Charter Solutions, Inc. Works with **ProVation Medical** to find an analytics solution

“The team was curious, thoughtful, and took the appropriate amount of time to understand our needs before offering strategies and solutions.”

~Matthew Tugman, VP Sales Effectiveness, Clinical Software Solutions

CLIENT SUCCESS PROFILE

Company: ProVation Medical, Inc.

Industry: Healthcare

Location: USA

*Solution: Xplor!
Analytics Platform as a Service*

*Technologies Used:
Tableau Desktop,
Xplor! Advanced Platform, powered by Tableau*

INTRODUCTION

ProVation Medical Inc. is a premier software provider of procedure documentation and clinical decision support solutions. From cloud-based and on-premise procedure documentation software to evidence-based order set and care management solutions, ProVation helps companies put productivity into practice. ProVation is trusted in more than 3,300 hospitals, ambulatory surgery centers (ASCs) and medical offices, including 42 of the top 50 U.S. hospitals for gastroenterology (GI) and GI surgery.

CHALLENGE

The ProVation Medical Sales Effectiveness team provides senior management with a detailed dashboard view of the sales pipeline on a weekly basis. The data and visuals for dashboarding were extracted from the Salesforce.com and SalesLogix CRM. The current technology environment was cumbersome to use and lacked capabilities to help the company gain analytical insights that were integral for strategic growth.

QUICK TO VALUE

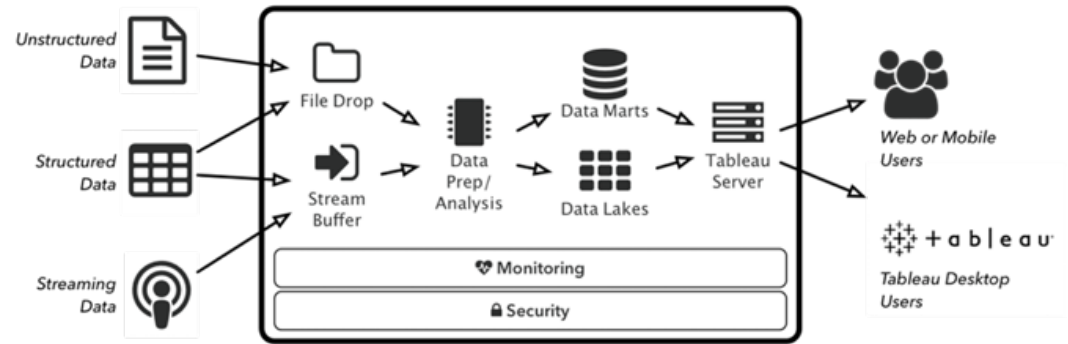
The Xplor! PaaS Advanced Platform, powered by Tableau was selected as ProVation’s Business Intelligence tool to address the following needs:

- ▶ Improved dashboard graphics
- ▶ One central view of the business
- ▶ Predictive Intelligence providing year to year performance comparisons
- ▶ Push Alerts
- ▶ Flexibility to add other data sources in the future
- ▶ Drill-down and drill-up analysis capabilities
- ▶ Self-service capabilities at the individual user level
- ▶ A scalable solution as user adoption increases

THE SOLUTION

In collaboration with key members of ProVation staff, Charter Solutions installed and configured Tableau Desktop for five users, connecting those users to the Xplor! Tableau Server environment assisting the ProVation team with the creation of content. Data for this effort initially came solely from the SalesLogix instance that supports ProVation’s business. Other business lines were added in subsequent projects.

This project made use of Charter Solution’s Xplor! Analytics as a Service offering to deliver the data processing, storage and reporting functionality.



The above diagram shows the general flow of operations provided by Charter Solution's Xplor! platform. Specific deliverables included:

"I would recommend Charter Solutions because of their knowledge, culture, professionalism and willingness to help."

- ▶ Setup SalesLogix data source which included: extraction of data from SalesLogix, building a supporting data schema for reporting, mapping and loading data into the data source scheme. This included automating the regular loads on Xplor!.
- ▶ Set up reporting users and security as well as develop and deploy dashboards.
- ▶ Provide Tableau training for the team on terminology, usage and best practices.
- ▶ Assist ProVation with building dashboards and visuals based on current process requirements.
- ▶ Design and build a data architecture for Tableau to use in the creation of dashboards and visualizations (i.e., mini-data-warehouse).

END RESULTS

While creating Tableau dashboards, Charter Solutions brought up Xplor!, a fully-managed, cloud-hosted, end-to-end platform for data management and visualization. This service is an analytics PaaS solution that eliminated the need to build and maintain an analytics and data management infrastructure. Xplor! allows customers to focus on gaining valuable insights while the underlying technology is taken care of by Charter Solutions. Benefits included:

- ▶ Getting to ProVation business insights quickly to maintain a competitive advantage.
- ▶ The Xplor! platform allowed ProVation to leap-frog their technology by turning the technology management over to Charter Solutions thereby eliminating the need to manage the data and infrastructure required to gain insights.
- ▶ Identified opportunities for operational process improvement to create more timely and frequent reporting.
- ▶ Engaged in an annual subscription for Xplor! in 2017 and continued year-over-year renewal through 2020, expanding to 3 Authors and 43 Reader licenses.

A five-star rating"
★★★★★

Every company, every client is different in terms of need, culture, best practices and expectations. Charter Solutions consistently commits to deliver value that best fits the needs of the client and partners with the intent to exceed those expectations.

It's the Charter Way.



ABOUT CHARTER SOLUTIONS

Charter Solutions delivers business and technology consulting services that help companies we partner with harness the power of data, analytics, the cloud, and application development to improve business outcomes. Our multi-industry experience allows us to uncover new solutions and guide clients to the best-fit application of technology to meet their goals.

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