

Industry: Healthcare

Solutions: Connected Business; Managed Services; Training

Custom IT Solution Helps Local Business Accelerate Regional Expansion

Introduction

If you were to look at the list of industries, considered to be “winners,” that sustained operations in the aftermath of the Covid-19 pandemic, you’d find a fairly predictable assortment that includes **pharma, cloud computing, gaming, and retail/e-commerce**. However, even if your industry is on the winners shortlist, the universal questions on the minds of every remaining owner—but especially those with **evolving operating models** and/or **digitally-transforming businesses**—are, “When is a good time to expand?” and, “Where do I begin from a technological standpoint?”

A Good Time for Growth

In this case study, we explore how a **custom IT solution**, architected and implemented by managed IT services provider, *Path Forward IT*, helped one local business expand faster—accelerating acquisitions from a slow, natural-growth progression to a streamlined, standardized onboarding process wherein **independently-operated locations could be more easily amalgamated into the larger organization**.

Background

Evolution of a Prior Customer Relationship

The subject of this study is a well-recognized and respected **Orthopaedics services provider**, with a large footprint, within its region. But it wasn’t always so large, nor were its treatment offerings and facilities so expansive as to include **athletic training, physical therapy, onsite imaging / x-ray, surgery centers** and **urgent care**—not to mention the **medical direction** it provides for 30+ local high schools, five college athletics programs, and professional sports teams—including the *Cincinnati Reds*.

Back in 2002, neither fledgling enterprise MSP, *Path Forward IT (PFIT)* nor *Beacon Orthopaedics & Sports Medicine (Beacon)* could necessarily have predicted the **mutual betterment** that would result from the intersection of their journeys. Established in 1996, *Beacon* was *PFIT’s* first customer in 2002.

A Developing Opportunity

With deep expertise in orthopedics, oncology and healthcare IT environments, priorities and protocols, along with working knowledge of most every EHR and PM system on the market, **PFIT was a natural choice** to help *Beacon* **operationalize processes**, and **establish a secure, scalable framework** to build upon. As *Beacon* grew its world-class orthopaedical and sports medicine care center within the Ohio-Kentucky-Indiana tri-state, *PFIT* built out its comprehensive **end-to-end managed services; rapid response / recovery; and scalable business expansion** models.

“We saw there could potentially be an opportunity in targeting PE <private equity> firms that were buying these smaller, rural practices... integrating and standardizing all the disparate pieces of different types of businesses, each with their own set of operations and processes. We knew we had a unique combination of technical and business IT services, including those that are healthcare-specific, like PatientSync and our LYP Contact Center. By including our managed IT services, and cloud and data protection solutions in the mix, we believed we could really bring value to those investments.”—Nick Recker, Path Forward President and Founder

Positioned for Success

In 2019, *Beacon* established national management services organization, *Ortho Alliance*, in partnership with private equity firm, *Revelstoke*. Because *Beacon* had been so successful in developing **best-in-class practices with true orthopaedical expertise**, acquiring additional orthopedic practices that were well-positioned for growth was a natural next step, according to Peter Cha, MD and president of *Beacon*, *“These physicians are at the top of their game. By adding talented physicians and more locations, we can expand upon our core tenets of providing quality, access and value.”*

The potential benefits to the community, the alliance, the individual practices and, of course, the patients were also many, including:

- Expanded services bolster the entire region
- Collective expertise and experience
- Wider network of services for practices
- Better care at a lower cost

Challenges

Mix-and-Match Technology

When it comes to implementation across multiple and varied locations, however, platform **standardization** is no small task. According to *Path Forward IT*, **digital maturity** is different for every industry but, regardless of where they're at from a technological standpoint, the first priority is ensuring a **clean understructure**. *"Before you can even consider integrations, you have to ensure all technology is "clean", not corrupted, and that you're integrating it in a secure way—especially when you have HIPAA and other healthcare compliance standards—it's very important that you thoroughly test that environment," says Adam Brock, Senior Director, Data Protection, Path Forward IT.*

Data Security and Compliance Adherence

"In this case, data capture standardization, storage, handling and usage are all concerns. With the surgical side, Big Data files for x-rays, MRIs and other sensitive patient information needs to be securely handled, shared, stored and backed up. From the standpoint of the business owner and private equity firm, how compliance, business intelligence and KPIs are being measured is key," says Brock.

Scale Means More Manpower

Growth typically calls for more manpower... but does it have to mean more headcount? Not necessarily, but more on that later. You know you want to pursue expansion but, are you going to ask your IT team to take on even more work? They're already stretched, troubleshooting iPads, the prescription ordering system, the MRI reader, the printer... it's unrealistic to expect your in-house IT team to absorb the technical responsibilities of an expansion plan, if for no other reason than, because it comes at a cost. It's just too much additional workload to do well... and **it's too important to not do well.**

Nearly two-thirds of leaders say a digital skills gap in their workforce is holding them back from more aggressive pursuits.

Business Continuity

Being able to continue business as usual is the **most important element** of an expansion for every business owner, regardless of industry. How easy would it be to just turn everything off, do the work, then turn it all

back on? Sadly, most can't do that, particularly in healthcare where the daily flow of patient appointments can't be interrupted. So, much of the work has to happen after hours, overnight and remotely.

Expansion Solution

A Custom Solution as Unique as the Customer

Maybe it goes without saying, but expansion solutions are as varied as the industries, business types and customers, according to PFIT. *“Because we've been alongside Beacon in their success from day one, we've helped them ramp up... they started as one office, then there were two, then three and so on. So, we've essentially built the expansion processes and best practices alongside them, making it possible for them to open up new locations more easily.”* says Mindy Smyth, Vice President of Communications, Path Forward IT.

Not surprisingly, PFIT kicks off its process with an audit and assessment, measuring systems against a proprietary security checklist that guides standardization for structuring the business. This is followed up with testing, updating and patching to alleviate potential for risk. All technology elements have to be standardized, from the network topology down to the workstations. At the same time, capacity to support future scalability is considered, including storage, bandwidth, security—anything the specific business needs to grow. From an IT perspective, PFIT operationalizes processes and practices, applications, hardware and software and puts the workflows in place.

Two (or 25+) Are Better than One

In *Beacon's* case, PFIT was starting with best-in-class structure they, themselves, had previously built. With the *Ortho Alliance* established, new acquisitions assumed the *Beacon* name, enabling the independent practices with the **power of scale**, pooled resources, fully standardized operational best practices, improved patient records access, built-in easy onboarding and full technical support for each staff member.

Middle-market companies with a digital vision that is clear, comprehensive, and guides strategic decisions grow 75% faster on average than less digitally sophisticated peers.

For the patients of the acquired local practices, the benefits translate as **better prices** and **access** to all the *Beacon* service types, whether clinical, surgical, physical therapy or something else.

Unlimited Scalability Fueling Exponential Growth

With the platform standardization complete, integration strategies defined, and patient access improvements implemented, at this point, it's easier to open more offices because PFIT has a roadmap. *"Well, when they started to think about additional expansion, it's just the same approach but exponentially bigger. It's really a continuation of what we started with them, but accelerated, or slightly different because we're looking at integrating with a completely different practice. And, while they are both orthopedics, they might have different operational practices internally, on different platforms,"* says Smyth. PFIT can help identify where the opportunities are for **secure standardization and integration**, and then look at the **health of the entire enterprise** to leverage the economies of scale.

Live 24/7/365 US-based Monitoring and Concierge Support

As if it wasn't enough, to equip an organization to function more efficiently and effectively, then to carry its best practices over to new acquisitions, creating a seamless, streamlined experience, PFIT is also continually monitoring the enterprise environment of *Beacon* and *Ortho Alliance*. PFIT sports a fully-staffed help desk that monitors what's onsite, offsite and cloud-based; they look at the age of the hardware, equipment, cooling systems, where systems are backed up and more.

According to Smyth, this adds to PFIT's value propositions, that they have such deep working technical knowledge of the enterprise. *"When executives, surgeons or investors need it, they have a direct line to tech support that can speak to specifics that might otherwise take another call or two to answer hardware or software questions.* The concierge piece also means a business isn't on their own after everything is built. With PFIT's *PatientSync* software offering, all contacts can be programmed into the phone system, laying the foundation for personal one-to-one attention. *Say, Dr. Jones is calling... the minute that call comes through, his phone number comes up and we already know it's him, and he doesn't have to start a conversation from zero. We have a record of why he called previously and know whether he's still having the same problem,"* says Smyth.

You Provide the Vision, We'll Bring the Technology Roadmap

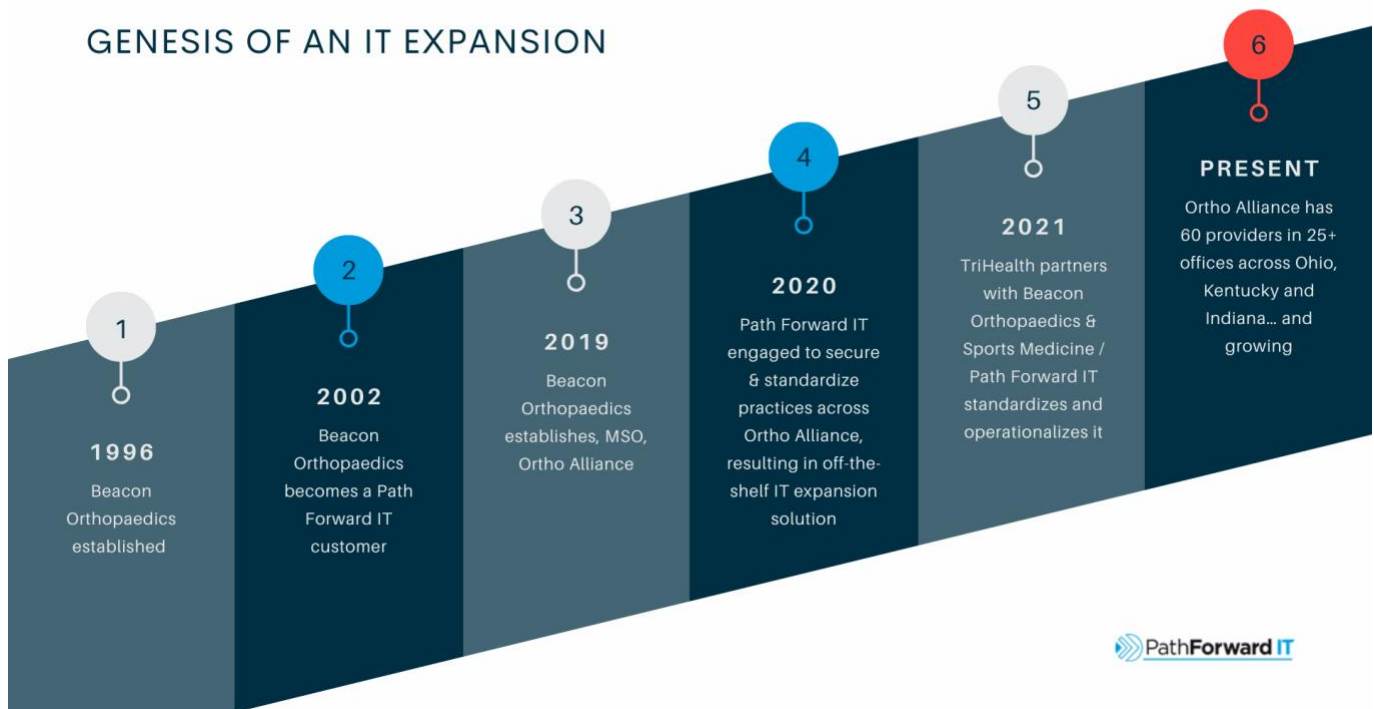
If you're a private equity firm acquiring businesses, or a growth-minded company in need of IT-driven growth strategy, process development, hardware/software integration, training and more, [let us help you](#) **standardize**, **secure**, and **scale** your unique business.

<https://www.pathforwardit.com>

Path Forward IT

At *Path Forward IT*, our mission is to improve our clients’ efficiency and effectiveness with unbiased guidance, seamless IT systems and applications support, and an unrelenting commitment to service. We dedicate the time to truly listen to every client’s business aim, evaluating where they stand today and supplying unbiased insight on which services and solutions will truly meet their goals. Every client we work with receives our undivided attention as we work together to create more efficient and resilient businesses. (“Enterprise IT Services Company | Path Forward IT”)

GENESIS OF AN IT EXPANSION



- 1996 - Beacon Orthopaedics established
- 2002 – Beacon Orthopaedics becomes a Path Forward IT customer
- 2019 - Beacon Orthopaedics establishes national MSO, Ortho Alliance / takes on private equity partner, Revelstoke
- 2020 – Path Forward IT engaged to secure & standardize practices across Ortho Alliance, resulting in off-the-shelf IT expansion solution
- 2021 - TriHealth partners with Beacon Orthopaedics & Sports Medicine / Path Forward IT standardizes and operationalizes it
- 2021 – Ortho Alliance has 60 providers in 25+ offices across Ohio, Kentucky and Indiana... and growing

Resources

- [13 most difficult-to-fill IT jobs, CIO Magazine](#)
- [Trends that will define 2021 and beyond: Six months on](#)
- [Prospering in the pandemic: the top 100 companies, Financial Times](#)
- [The 5 Fronts of Digital Transformation in the Middle Market, Harvard Business Review](#)