

Patient targeting & tracking unbilled orders

(Medical equipment company)

- Tracked patients by their eligibility for a re-supply of medical equipment and created a prioritized list of patients to help the client to better target those patients.
- Also, tracked the latency involved in invoicing the Insurance Companies after the product was shipped and tracked the unbilled orders by their status to prioritize the orders that are easy to resolve.

Effective patient targeting and minimizing unbilled orders

Situation

- Client was facing an issue with unbilled orders because of the poor integration between CRM and Billing systems. They also had an opportunity to improve their CRM efficiency by effectively targeting patients for re-supply.
- Helped drive the topline by identifying potential revenue leakages and by increasing the accuracy of patient target capabilities for resupply

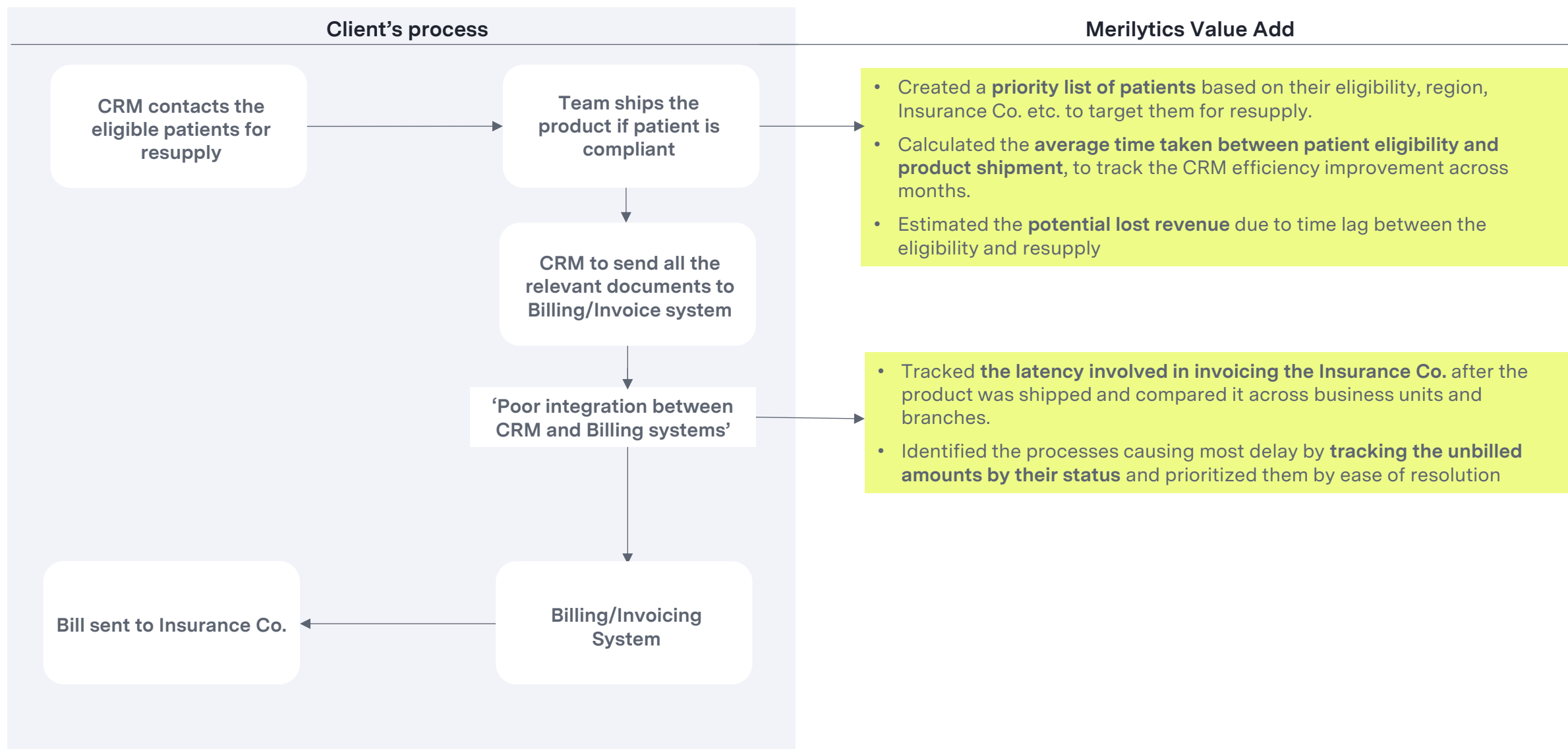
Accordion Value Add

- Tracked monthly patient level eligibility, resupply and delivery of the product to understand lag time, potential missed revenue, etc.
- Provided granularity by creating additional productivity metrics to track the efficiency of the CRM
- Tracked the ongoing integration of the CRM and the Billing systems by region, business unit and product to identify potential unbillable orders
- Tracked the unbilled orders by their statuses to identify the process inefficiencies which are driving these unbilled orders

Impact

- Our analyses helped the client to identify the major sources of unbilled orders and prioritize the integration between the CRM and Billing systems in those areas
- Client was able to track eligible patients in real time sorted by lag time so that they can better prioritize the work-flow of the CRM
- It also enabled the client to assess the potential growth in topline sales and revenues directly improving the net revenue.

Approach & methodology



Report to track re-supplies to patients

Resupply Report

Last Updated on 2019-09-10

Business Entity

All

Region

All

Subregion

All

Branch

All

Apply

Resupply Report

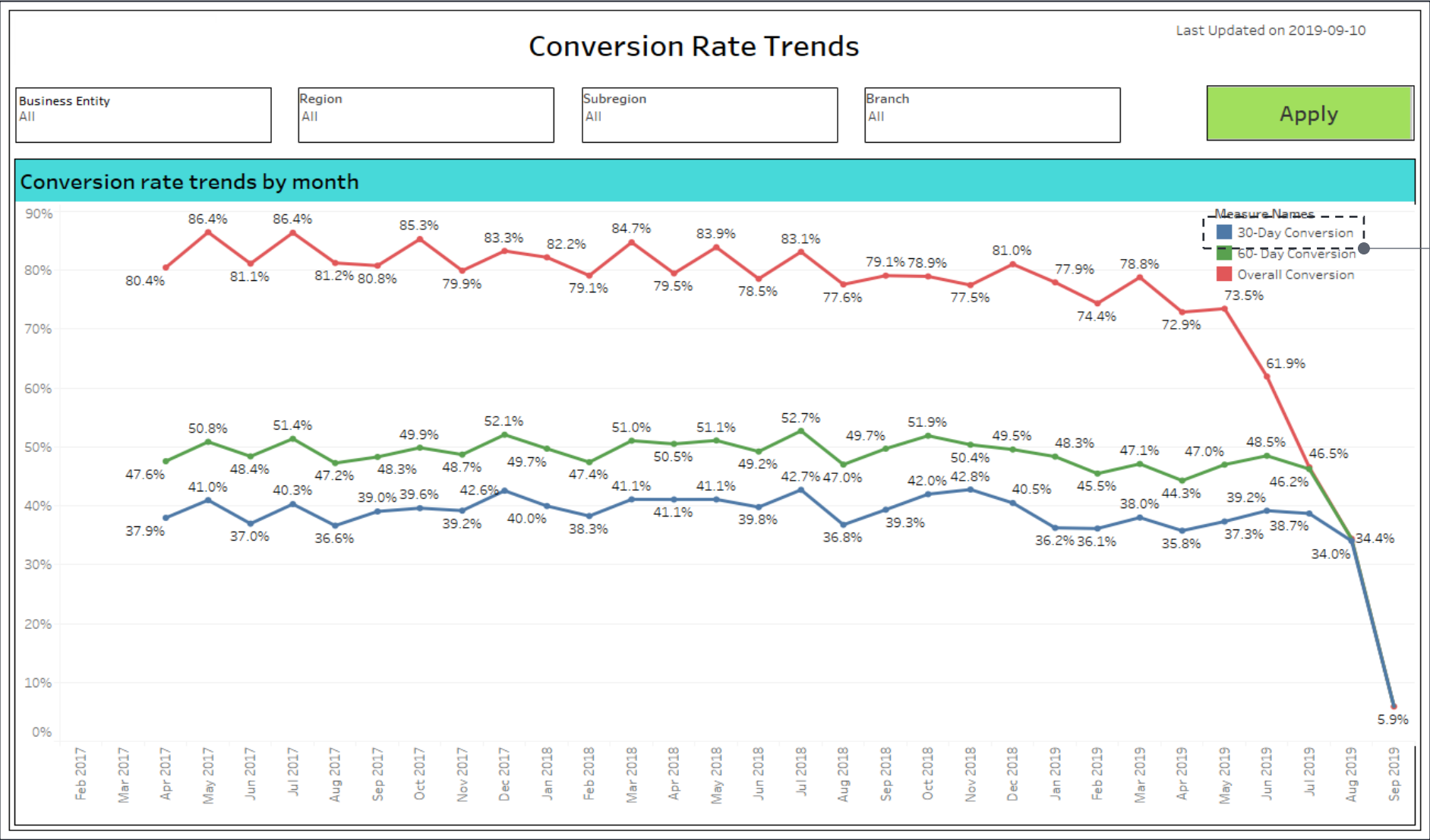
Year	Month	Cum. Open Eligible Pt	Newly Eligible	Shipped	Cum.close Eligible Pt	30-Day Conversion	60- Day Conversion	Overall Conversion
2019	September	194,474	74,320	14,492	254,302	5.9%	5.9%	5.9%
	August	195,611	74,202	63,171	206,642	34.0%	34.4%	34.4%
	July	192,780	74,841	61,399	206,222	38.7%	46.2%	46.5%
	June	188,383	76,855	59,382	205,856	39.2%	48.5%	61.9%
	May	184,537	69,893	55,748	198,682	37.3%	47.0%	73.5%
	April	179,833	72,320	57,560	194,593	35.8%	44.3%	72.9%
	March	174,306	75,989	58,317	191,978	38.0%	47.1%	78.8%
	February	159,946	76,955	50,160	186,741	36.1%	45.5%	74.4%
	January	144,234	75,291	47,536	171,989	36.2%	48.3%	77.9%
2018	December	146,183	40,441	35,222	151,402	40.5%	49.5%	81.0%
	November	145,507	41,504	33,571	153,440	42.8%	50.4%	77.5%
	October	144,210	36,587	29,734	151,063	42.0%	51.9%	78.9%
	September	140,306	38,702	25,302	153,706	39.3%	49.7%	79.1%
	August	136,915	42,558	29,978	149,495	36.8%	47.0%	77.6%
	July	137,105	33,620	25,857	144,868	42.7%	52.7%	83.1%
	June	134,597	38,698	27,320	145,975	39.8%	49.2%	78.5%
	May	139,451	31,937	29,607	141,781	41.1%	51.1%	83.9%
	April	135,705	33,944	22,641	147,008	41.1%	50.5%	79.5%
	March	127,731	38,003	27,745	137,989	41.1%	51.0%	84.7%
	February	120,751	32,181	22,555	130,377	38.3%	47.4%	79.1%
	January	112,754	35,021	24,398	123,377	40.0%	49.7%	82.2%
2017	December	108,172	34,376	27,398	115,150	42.6%	52.1%	83.3%
	November	96,385	36,565	22,071	110,879	39.2%	48.7%	79.9%
	October	89,718	32,062	23,111	98,669	39.6%	49.9%	85.3%
	September	80,546	34,682	22,722	92,506	39.0%	48.3%	80.8%
	August	72,600	34,530	23,557	83,573	36.6%	47.2%	81.2%
	July	63,349	30,516	18,847	75,018	40.3%	51.4%	86.4%
	June	47,354	36,810	18,450	65,714	37.0%	48.4%	81.1%
	May	33,723	31,989	16,999	48,713	41.0%	50.8%	86.4%
	April	14,463	31,486	11,000	34,949	37.9%	47.6%	80.4%
	March	13,895	0	3,458	10,437			
	February	9,770	0	1,496	8,274			

Total eligible patients to be resupplied in that month

Patients who became eligible in current month

Percentage of patients re-supplied within 30 days of them becoming eligible

Tracking conversions over time



Percentage of patients resupplied within 30 days of their eligibility

Reconciliation of orders and billing to track revenue leakage

Reconciliation Report

Business Entity

(All)

Region

(All)

Subregion

(All)

Branch

(All)

Apply

Reconciliation Summary

	Shipped	Billed	Confirmed	Open	Delta	Delta %
Jun - 19	21,057	20,466	19,222	1,244	-591	-3%
May - 19	84,881	83,133	80,984	2,154	-1,748	-2%
Apr - 19	85,527	82,858	81,590	1,270	-2,669	-3%
Mar - 19	80,985	79,186	78,398	794	-1,799	-2%
Feb - 19	71,944	69,863	69,343	526	-2,081	-3%
Jan - 19	72,649	70,095	69,881	214	-2,554	-4%
Dec - 18	72,708	69,830	69,593	239	-2,878	-4%
Nov - 18	69,667	63,723	63,560	164	-5,944	-9%

Order Status Summary

	Closed	New	Delivered	Stopped	Held
Jun - 19	19,222	126	1,118	33	100
May - 19	80,984	109	2,045	314	280
Apr - 19	81,590	39	1,231	565	132
Mar - 19	78,398	7	787	601	11
Feb - 19	69,343	10	516	424	13
Jan - 19	69,881	5	209	375	12
Dec - 18	69,593	15	224	459	14
Nov - 18	63,560	7	157	438	13
Oct - 18	65,631	7	198	308	21

Number of
Unbilled orders
(Billed -
Shipped)

Reconciliation of orders and billing to track revenue leakage

Reconciliation Report

Business Entity

(All)

Region

(All)

Subregion

(All)

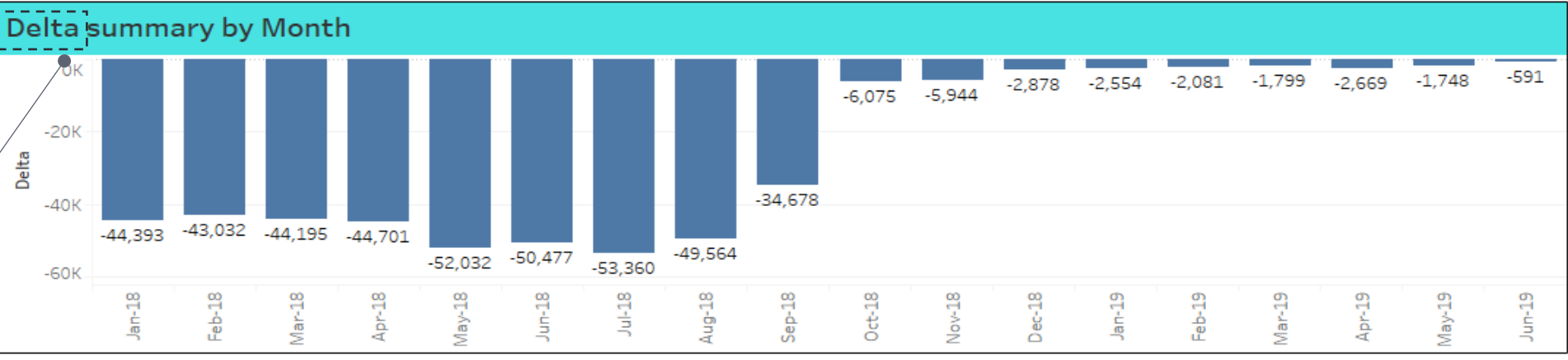
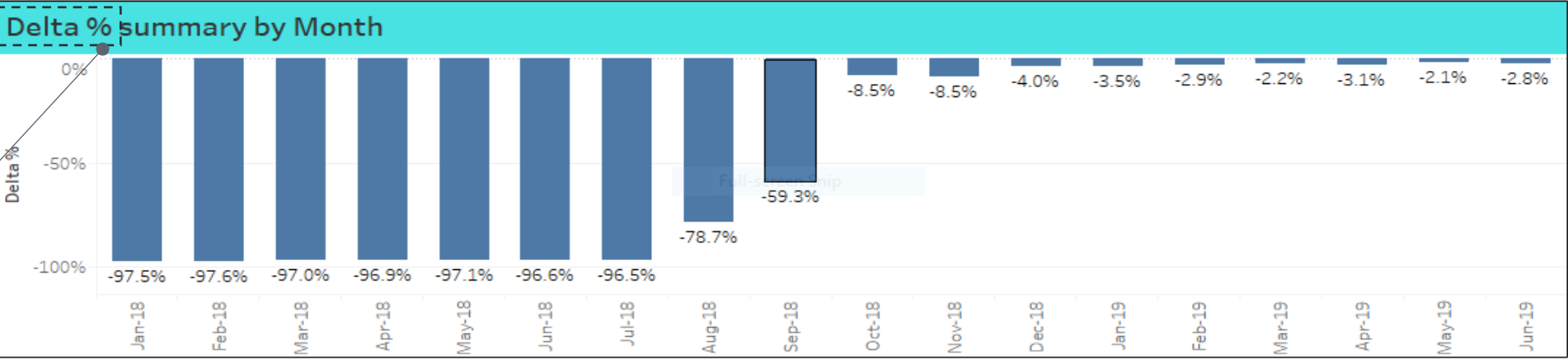
Branch

(All)

Site

(All)

Apply



Percentage of Unbilled orders (Billed - Shipped) to Total Shipped orders

Number of Unbilled orders (Billed - Shipped)

Recon report

