

# Elion

## Buyer Review Transcript

Product Reviewed	Welkin
Reviewer Tech Stack	DrFirst, Customer.io, Sendbird, Zoom
Other Products Considered	
Date	August 24, 2023
Expert Role	Product Manager
Organization Type	Digital Health Provider
Payment Model	Fee for Service, Cash Pay

**So today, we're chatting about Welkin and how it's being used at your company. Before we jump into that, could you give just a brief overview of the company and your role there?**

Yeah, we're a relatively small digital health company focused on improving mental health outcomes. I am the product manager.

**How long have you been using Welkin?**

Since the last quarter of 2021.

**What was the need you were looking to fill when you were purchasing Welkin?**

As a digital health company, we were looking for an electronic health record (EHR) system that had a high level of modularity and prioritized APIs. Although I wasn't present during the decision-making process, I know that having a robust API was crucial to us.

**What are the problems that Welkin solves for you today?**

Welkin supports our clinical operations. Our clinicians heavily rely on it for tasks such as recording notes, joining meetings, and reviewing patient charts. Welkin also drives an app that we developed that serves as our middleware. One of the major advantages of using Welkin is its flexibility in creating complex care plans. It allows us to easily customize and tailor care plans according to our needs, because it has awesome automation tools for moving patients through

their care plan based on user behavior or completed encounters. Welkin also serves as our production database, and while Welkin itself does not possess analytical capabilities, all our analytics are derived from the data extracted from Welkin. We're also using Welkin for e-prescribing. As of now, we are not utilizing Welkin for scheduling purposes.

### **What makes them special on the care plan component?**

I find their automation engine to be quite robust, as it allows us to develop and configure care plans much more quickly. As an example, when a patient finishes a specific type of appointment, the clinician can mark it as completed. We have different types of programs available, so depending on the type of appointment, the specific care program, and the clinician's action, we can progress the patient accordingly. Instead of having to set up this logic in the middleware, we can easily configure it in Welkin's platform using a no-code approach.

### **How was the onboarding and setup process for Welkin?**

The initial implementation process took close to three months. We had weekly calls with the onboarding specialists from Welkin and also had weekly educational calls to understand how Welkin works. They provided an onboarding plan and support, but I wish they had better documentation. Perhaps they do now. Their guidance was more general, and I think our initial implementation would have been much smoother if they had better gotten to know our business and objectives. We had to ask a lot of questions and rely heavily on reaching out to someone for explanations. Oftentimes, they had to get back to us because our implementation manager did not know offhand.

Welkin is very particular about how to set it up from the back end. It's a no-code solution in terms of configuration, but it requires a nuanced approach. Unfortunately, they didn't provide documentation for this. They may have them now, though.

### **What are some of Welkin's strengths and weaknesses?**

Our clinicians have been able to pick up the system pretty quickly on the front end. It's highly configurable, so we've had success with it. It doesn't overwhelm our clinicians. I wouldn't say it's perfect, but it gets the job done.

But there are some weaknesses. The scheduling function is very bare bones if you want patients to be able to self-schedule, and at a certain point when you have complexity in your workflows, it will not suffice. The main issues are non-flexible working hours (they can't change from week to week) and you cannot set separate calendars for virtual or in-office.

I think they may have oversold their integrations as well. For example, they say they have a Zoom integration, but all they have is the ability to link a Zoom meeting. Additionally, their

messaging integration with Twilio lacks flexibility. You can only message the entire “care team,” so if you want to reach out to your health coach, you have to message the entire team that is assigned to the patient. This can cause confusion among the care team.

As far as the e-prescribe functionality, we've had headaches with DrFirst. We have to go through Welkin to talk to them because they hold the contract. Troubleshooting becomes complicated, as we don't have an account rep, only a Welkin rep to relay our messages.

### **Do you feel like the platform is relatively reliable?**

Yes.. Once we got everything set up and running, it has been reliable. We have come across a few bugs, but they have been responsive in fixing the core issues. However, they were also not as responsive as we might have liked on issues that we consider fundamental and should be present in any EHR system. I think their engineering team might be relatively small.

### **Did you build on top of the platform and integrate with Welkin APIs?**

Yeah, we did. I think our experience with Welkin's APIs has been pretty good overall. I'm not a developer, so I don't know all the technical details, but we haven't come across any situations where we wanted to integrate with them and couldn't. So I would say that Welkin's APIs are pretty robust. As for their API documentation, I can't speak to that, but I can say that their documentation for the no-code configuration aspect is not good.

### **Did you attempt to integrate Welkin with other products in your tech stack?**

Yeah, so we've integrated Welkin with a scheduling tool, because Welkin's scheduling tool wasn't enough for us. We also integrated Welkin with our data warehouse and Twilio for patient messaging, and we created a custom integration with Zoom. We also added DrFirst and a few other products. For the platforms we integrated ourselves, everything has worked as planned. The issues that we've faced are the integrations that come out of the box (Welkin created).

With Twilio, the inability to message a specific care team member has been a problem. Zoom doesn't really have a proper integration. And DrFirst's reporting doesn't work as expected.

### **How have you found the account management and support teams?**

Yeah, they're nice people. They work hard and are quite responsive, I'd say. However, when we first started working with them, it felt like they didn't do a great job of getting to know us. I think, especially when it comes to such an important purchase, there should have been more effort on their part to really understand our business and provide more personalized support.

**Looking back, do you feel like you made the correct choice with Welkin for your particular organization?**

It's tough to say for sure what could have happened in a different scenario, but there's definitely one EHR system that seems like it might have been a better match. Nonetheless, we have managed to make it work with Welkin. I do think that having more integrations would have greatly benefited us in terms of areas of growth.

**Are there any areas of growth where Welkin could do a better job?**

It would be great if Welkin could establish a developer community where integrations could be created, almost like a marketplace for them. If I had to pick one area that needs improvement, it would probably be the onboarding experience. It could benefit from a little more guidance and support, because the system itself is quite complex. Once you make decisions, you're pretty much stuck with them for a long time. Unlike some other EHRs where you can get up and running quickly, building on top of Welkin takes time, and you have to live with the decisions you've made. Them having considerations, best practices, or information on how other companies are handling it would have been very helpful in that regard.

**What sort of customers might be ideal for Welkin?**

I think the best fit would be a company that is genuinely interested in building a robust and complex health stack, as it's not an out-of-the-box solution.

**Do you have any advice for buyers when they're selecting an EHR?**

Yeah, your EHR ends up becoming a crucial part of your technology stack. Everything is going to attach or connect to it in some way. So it's important to identify your top must-haves and thoroughly explore them before making a decision. I've integrated various software products in the past year. Many of the digital tools available are from smaller SaaS companies. They have their limitations and might not always function exactly as you want them to, so you have to work around those shortcomings and adapt to manage certain situations. When it comes to purchasing, my advice would be to find referrals from current users of the product.