

# Case Study

Transforming Operations with Process Automation

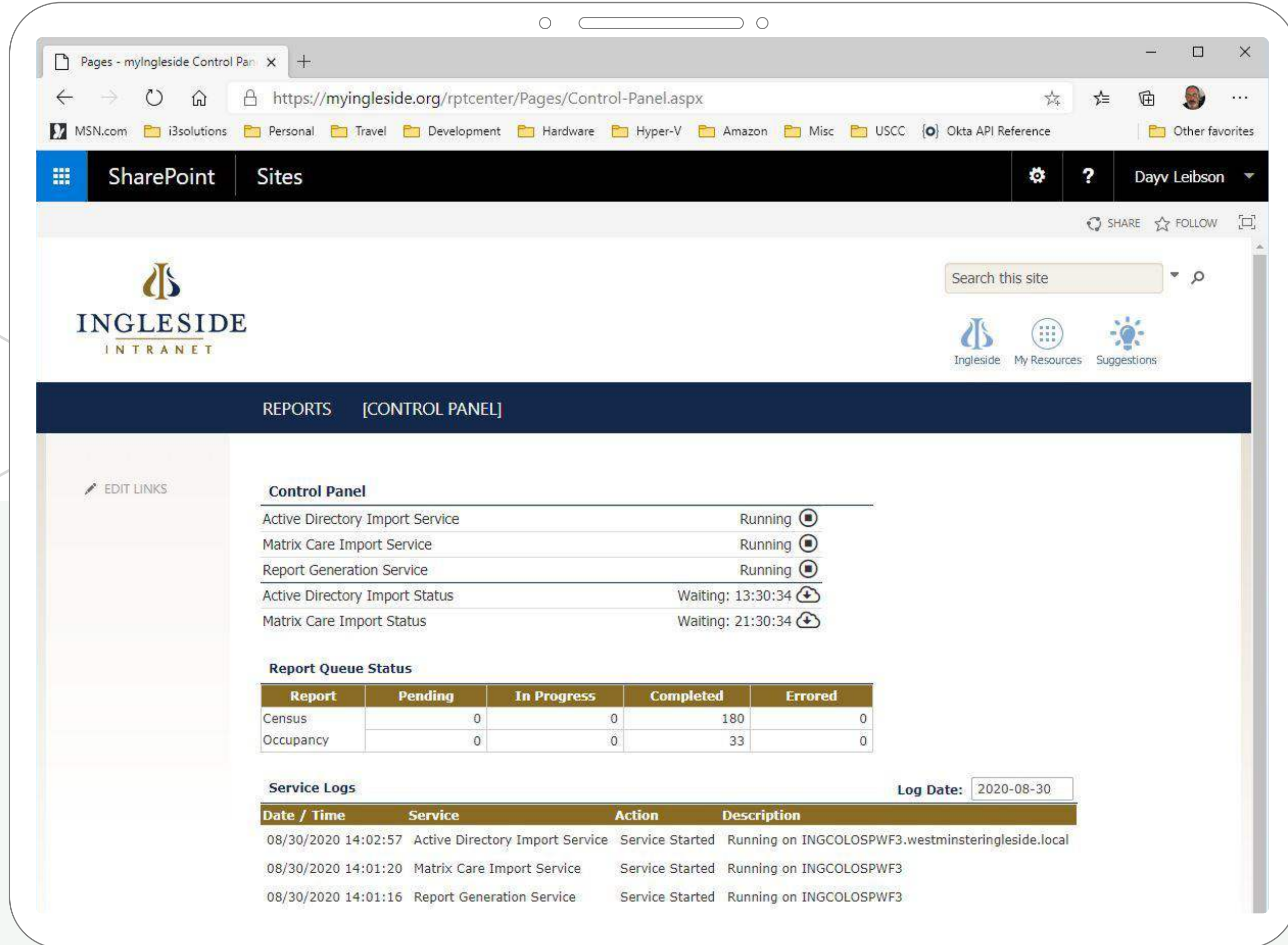


## The Customer

And Their Challenge

Ingleside, the driving force behind three not-for-profit Life Plan communities in the Washington DC area, faced significant challenges due to inefficient manual processes. In their marketing department, the handling of image and graphic requests relied on a cumbersome paper-based system. This approach led to frequent lost requests and a lack of visibility into the status of each request. The reliance on paper and verbal communication created bottlenecks and hindered the efficiency of the workflow, making it difficult for the marketing team to manage and track their tasks effectively.

Additionally, the organization struggled with tracking and measuring progress toward quarterly goals. The absence of a structured tracking system meant that departmental progress was only discussed informally during meetings, leaving team members in the dark about their achievements. This lack of formal tracking not only made it challenging to assess goal attainment accurately but also posed significant issues for merit-based compensation. With bonuses tied directly to these goals, the inability to measure progress effectively created complications in evaluating and rewarding performance fairly.



## The Solution

Marketing Request and Organizational Goal Applications

Recognizing the need for streamlined and efficient operations, i3solutions leveraged Business Process Management (BPM) to transform Ingleside's manual workflows into automated, standardized processes. Focusing on optimizing and automating business operations, i3solutions aimed to enhance efficiency and effectiveness and embarked on a comprehensive modernization journey to address Ingleside's operational challenges.

The core of the solution is a standardized Marketing Request entry form, providing a user-friendly online platform to submit requests for images and graphics. The entire lifecycle of a request, from submission to completion, is meticulously tracked through queues. Users can effortlessly monitor the progress, viewing who completed each step and when.

Harnessing the power of cutting edge technologies, i3solutions designed and developed a Marketing Request Application intended to revolutionize how marketing requests are handled and how organizational goals are tracked.

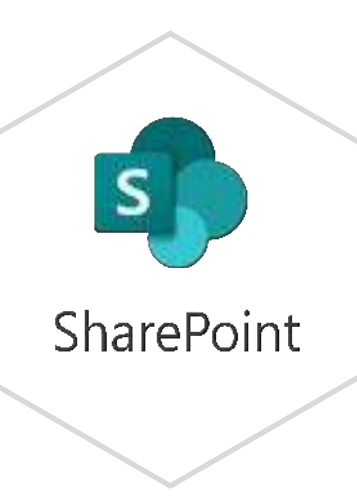
Simultaneously, i3solutions introduced an application to track organizational goals. Goals, originating from team leaders, cascade down to individuals or managers who can align their objectives accordingly. The application facilitates straightforward progress tracking, offering roll-up reports for management, team status reports, and individual progress tracking.

i3solutions began by conducting a detailed assessment to identify inefficiencies and bottlenecks within Ingleside's manual processes. Using this insight, i3solutions developed a plan to automate workflows that standardized operations and streamlined task management. The team crafted detailed process maps and wireframe diagrams to visualize and plan the new workflows. By continuously collaborating with Ingleside's team, i3solutions ensured that the solution was tailored to the organization's specific needs, driving significant improvements in operational efficiency and effectiveness.

The resulting applications effectively replaced a fragmented system of manual spreadsheets and paper forms, bringing a new level of consistency and efficiency to the organization. By consolidating and automating these processes, the applications ensure uniformity in requests and tracking, and eliminate the errors and delays associated with manual methods. This transformation not only streamlines operations but also enhances accuracy and reliability, enabling the organization to operate more smoothly and effectively.

## Technologies

Used in the Solution



At the core of the solution is SharePoint, which provides a collaborative platform for building the applications and serves as the secure repository for marketing requests. The image and graphics request form is built directly in SharePoint, leveraging its robust features to manage submissions and track progress. With permission structures in place, SharePoint ensures that only authorized users can submit and edit requests. This foundational technology establishes the groundwork for streamlined collaboration and efficient data management.



Angular is used to create a dynamic and responsive user interface, enhancing the overall user experience. Its powerful features allowed for the development of interactive components and real-time updates, ensuring a seamless and engaging experience for users. Angular's robust framework supports efficient data binding and component management, contributing to the application's performance and responsiveness.



Utilizing the MVC architecture, i3solutions systematically organized the development of the web applications. This approach, which separates data handling, user interface, and application logic, significantly improves both maintainability and scalability. It ensures a coherent and organized development process, allowing for more efficient updates and expansions.



As the database system, Raven DB provides efficient data storage and retrieval. Its NoSQL, document-oriented structure accommodates the diverse data requirements of the applications, offering flexibility and scalability in handling information related to marketing requests and organizational goals.



The robust capabilities of .NET were harnessed for backend development. This technology played a pivotal role in shaping the logic and functionalities of both applications. It facilitates seamless integration, user authentication, and efficient data handling, contributing to the overall reliability of the solutions.



Integrated for email functionality, SMTP facilitates communication within the applications. Automated email notifications kept stakeholders informed about the status of marketing requests and goal progress, contributing to improved communication efficiency.



jQuery streamlines scripting tasks, simplifying complex JavaScript code and enhancing the responsiveness of the user interface. JavaScript plays a crucial role in dynamic content updates, form validations, and real-time status tracking, contributing to an interactive user experience.



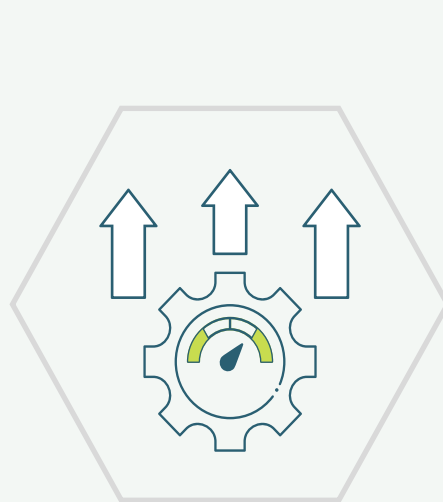
Kendo UI is instrumental in creating a responsive and interactive user interface. Its components, including advanced elements like grids and charts, enhance the presentation of data, providing a visually rich experience and further improving overall user interaction.



Employed for front-end development, Bootstrap ensures a responsive design that adapts seamlessly to various devices. CSS, working in tandem with Bootstrap, dictates the visual layout and presentation of the applications. This combination results in a consistent, visually appealing, and branded user interface.

Facility	Type	Category	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Independent Living</b>														
IL	Beginning Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
IL	Move-ins		0	0	0	0	0	0	0	0	0	0	0	0
IL	Move-outs		0	0	0	0	0	0	0	0	0	0	0	0
IL	Ending Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
<b>Assisted Living</b>														
AL	Licensed For		0	0	0	0	0	0	0	0	0	0	0	0
AL	Average FFS 1st		0	0	0	0	0	0	0	0	0	0	0	0
AL	Average FFS 2nd		0	0	0	0	0	0	0	0	0	0	0	0
AL	Average LC 1st		0	0	0	0	0	0	0	0	0	0	0	0
AL	Average LC 2nd		0	0	0	0	0	0	0	0	0	0	0	0
AL	Ending Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
AL	Person Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
<b>Memory Support</b>														
MS	Licensed For		0	0	0	0	0	0	0	0	0	0	0	0
MS	Average MS FFS 1st		0	0	0	0	0	0	0	0	0	0	0	0
MS	Average MS FFS 2nd		0	0	0	0	0	0	0	0	0	0	0	0
MS	Average MS LC 1st		0	0	0	0	0	0	0	0	0	0	0	0
MS	Average MS LC 2nd		0	0	0	0	0	0	0	0	0	0	0	0
MS	Ending Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
MS	Average Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
MS	Ending Avg. Person Occupancy		0	0	0	0	0	0	0	0	0	0	0	0
<b>Skilled Nursing</b>														
HC	Avg. LC 1st		0	0	0	0	0	0	0	0	0	0	0	0
HC	Avg. LC 2nd		0	0	0	0	0	0	0	0	0	0	0	0
HC	FFS/Direct Admt		0	0	0	0	0	0	0	0	0	0	0	0
HC	Medicare		0	0	0	0	0	0	0	0	0	0	0	0
HC	Medicaid		0	0	0	0	0	0	0	0	0	0	0	0
HC	Total Occupancy		0	0	0	0	0	0	0	0	0	0	0	0

## Measurable Benefits and Business Impact



**Improved Efficiency**

The transition to automated systems significantly reduces the time spent on manual data entry and tracking. This efficiency gain translates to faster processing of requests and tasks, leading to overall productivity improvements for Ingleside.



**Enhanced Accuracy**

By replacing manual spreadsheets and paper forms with automated applications, Ingleside minimizes the risk of errors associated with manual data handling. This increased accuracy ensures that goal tracking and request management are more reliable and trustworthy.



**Greater Transparency**

The new systems provide comprehensive reporting and real-time visibility into progress and performance. This enhanced transparency facilitates better decision-making and keeps senior leadership informed of key metrics and project statuses. Additionally, users benefit from being able to see and track their own goals, which boosts accountability, motivation, and personal engagement with their objectives.



**Streamlined Communication**

With centralized and automated processes, communication regarding request status and goal progress becomes more efficient. This streamlined communication reduces delays and miscommunication, fostering better collaboration between teams and with senior leadership.