# Use Case: Healthcare Services

## GOALS AND CHALLENGES: WHY A PM SOLUTION IS NEEDED

➔ Using PM tool to document and manage onboarding process for healthcare organizations

➔ Manage work across the team and to have means to track timelines, deadlines and shared responsibilities and dependencies

➔ A single source for initiating, and developing project information across different perspectives - from owners to timelines to reporting

# Content and Online Education Needs
PROCESS STEPS AND CAPABILITIES

## HCO ONBOARDING, CONTRACTS AND DATA ACQUISITIONS

Creation of 1 onboarding template, which can be customized for each new client, so that once a contract is signed, tasks can be assigned and tracked immediately

Managing projects & requests from multiple service lines, who are all based in different locations across the US

## RECURRENT TASKS

Recurrent tasks to help manage the weekly and monthly meetings, used to discuss project metrics and progress

Request forms used to capture, and deliver on ad-hoc requests from other teams, and thus reduce the need to use email threads

# Measure of Success

Streamline the onboarding process, improve organization and communication amongst team members, and advance our reporting capabilities

# Healthcare Services
## SAMPLE CUSTOMERS

### SAMPLE #1

→ Folder structure based on Governance, Growth & Finance

→ Installed Outlook add-in so as to better funnel email requests

→ Project templates

### SAMPLE #2

→ Folder Structure for projects and tasks relating to Communications, Research, Government Relations, Policy, Administration

→ Project templates created as a reference to initiate future projects

### SAMPLE #3

→ Salesforce, Office 365 (SSO), and Adobe creative cloud integrations

→ Request forms to be submitted by Sales team which duplicates the onboarding project template