

## Case Study: ECP Brings SAL Management Group Live in Under a Week



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### Category:

- ◆ Operational Efficiency

#### About the Organization

##### Organization Name:

SAL ([Shake a Leg](#))  
Management Group

##### Main Contributors:

Cameron Harris,  
Chief Sales Officer

Brody Jardine,  
Chief Financial Officer

##### Organization Type:

Assisted Living

##### Organization Description:

SAL ([Shake a Leg](#)) Management Group specializes in managing assisted living communities, with a focus on creating safe, home-like environments and delivering exceptional care experiences. Committed to the values of compassion, responsibility, and communication, SAL's SUPER Caregivers prioritize resident well-being and satisfaction, striving to create positive interactions and foster a sense of community and belonging. Through continuous improvement and innovation, SAL aims to set the standard for excellence in senior living care.

#### Project Description

SAL Management Group provides a safe, home-like environment for residents through exceptional care experiences in 19 communities across Utah. SAL had struggled with software implementation in the past due to inadequate support and partnership during implementation. SAL was looking for a true partner to ensure software implementations went live quickly and successfully, and who was innovative and open to feedback so that they could ensure the software worked for their communities and workflows. SAL partnered with ECP, a leading provider of [eMAR](#), [EHR](#), [billing](#), and [CRM](#) software, to overhaul their operations and improve resident care.

When coming to ECP, SAL had very clear objectives for success:

- ◆ **Rapid Deployment:** After struggling with its prior software vendor, whose implementation dragged on for over a year, SAL was concerned about staff buy-in. To get staff bought into the new implementation, SAL looked to roll ECP out across all communities within three months using a “big bang” approach, including one week of on-site training.
- ◆ **Minimize Disruption:** SAL had workflows it was happy with and did not want to disrupt, such as its accounting workflows and general ledger system. SAL wanted to seamlessly integrate ECP with those tools and workflows.
- ◆ **Executive-Level Reporting:** SAL's corporate leadership wanted visibility into clinical, compliance, and business outcomes such as occupancy and lead sources throughout the resident lifecycle, with detailed insights into individual residents or locations.

#### Implementation Approach

ECP worked closely with SAL's leadership to understand their priorities and tailor the software specifically to their business. Because SAL was looking to replace a software vendor that provided eMAR, EHR, CRM, and billing, SAL opted to implement all four of those modules in ECP. SAL was happy with their current general ledger solution—Quickbooks Desktop—and elected to integrate ECP with QuickBooks Desktop.

SAL was coming off of an implementation with its prior vendor that was more than a year long; there had been a lot of staff burnout as a result. Eventually, staff members lost belief that the prior system would ever go live. To address this concern, SAL

and ECP agreed to implement all of SAL's communities simultaneously, and as fast as possible.

SAL and ECP developed a two-week implementation plan to go live across all ECP modules, [eMAR](#), [EHR](#), [billing](#), and [CRM](#), for SAL's 19 locations. The plan started with a one-week in-person classroom-based training program for all communities, followed by a week of focused post-go-live stabilization.

This aggressive timeline was made possible via three months of preparation. Expectations were set that going live this quickly would require all stakeholders to be on board. Several obstacles were identified early: How would users be trained in time? How would each location's settings be configured? How would all of the data be entered into the system in time?

### **Pre Go-Live Planning**

Preparation was key to ensuring things went smoothly. Ahead of the in-person week, SAL's executive team received in-depth training and got up to speed on which settings would impact all communities. SAL and ECP worked together to pre-configure the environment, so that the in-person week could be focused on training and so that the training environment would look exactly like SAL's real one.

Data was another big question. Both teams knew that if the onsite week was spent entering data, such as which unit each resident was in, their level of care, and all of their medication information, etc., there would be no time left for training. Given the large number of communities, manually migrating data would also be a massive headache.

To overcome this, SAL and ECP worked hand-in-hand to identify possible data sources that could be used to pre-populate the environment prior to the go-live week. This included exporting data from the legacy system and partnering with SAL's pharmacy. Spreadsheets were compiled, HL7 feeds were connected, and SAL's staff were saved from the bulk of the data entry work. The data migration was completed and SAL's environment was successfully pre-populated with data ahead of the go-live week.

### **Change Management and Group Training**

SAL and ECP decided that an in-person go-live week at a single location, bringing the leadership of all 19 communities together, would be the most effective. Catered lunches and group question-and-answer sessions built both camaraderie and excitement, and helped the team truly believe that a rapid go-live was possible. Training together also helped team members learn from each other. The SAL team bonded with the ECP team, eating together and working together all week, which deepened the partnership, too.

After the in-person week, the SAL leadership groups that attended the onsite were able to take the knowledge they acquired back home to their communities, where they had their respective staff fully trained and using ECP the following week.

### **Outcomes**

The implementation was a success. After trying and failing to successfully go live on their prior vendor for over a year, SAL was able to fully implement ECP across all 19 communities in only two weeks.

#### **Top Level Outcomes**

- ◆ 19 communities live in under one week.
- ◆ 12.4% increase in level of care revenue per resident per day.
- ◆ Reduced number of communities below 80% occupancy: from four down to one.

#### **The sales and marketing teams saw the following improvements with ECP's CRM:**

- ◆ **Increased Occupancy Rates:** Using ECP to track prospects and monitor next steps has led to more sales activities (calling and emailing prospects), improved win rates (prospects moving in), and higher occupancy.

"The enhancements provided by ECP have notably improved the capabilities of our marketing and sales teams, directly impacting their efficiency and success rates," said Cameron Harris, chief sales officer.

- ◆ **Real-Time Dashboarding:** The census and occupancy dashboard in ECP has improved live tracking of community performance, quickly addressing underperformance. Recently, it helped reduce the number of communities below 80% occupancy from four to one within a month.
- ◆ **Better Sales Metrics:** SAL used ECP to analyze marketing metrics and closing ratios, identifying areas for targeted coaching. This approach identified a new hire's struggles and quickly brought them up to speed. As a result, they went from zero closed deals in a month to seven closed deals in one week.
- ◆ **Improved Pricing and Room Availability Visibility:** ECP provided enterprise-wide room-level visibility into pricing and occupancy, which SAL uses daily to quickly assess room pricing and occupancy, enabling management of room availability and pricing strategies.
- ◆ **External Provider Collaboration:** SAL can easily give traveling physicians and external health care providers immediate access to residents' health records, medication lists, and care history. This access improves care delivery and communication between staff and external providers.
- ◆ **Streamlined Discharge Processes:** The discharge board feature in ECP provides insights into why residents are moving out, whether to homes, other assisted living facilities, or higher care settings like skilled nursing facilities. Analyzing these patterns helps identify trends and address issues to improve resident satisfaction and retention.

*The finance team used ECP billing for:*

*The clinical team also benefitted from ECP's eMAR & EHR:*

- ◆ **Transition from Paper to Electronic MAR:** The shift from paper-based to electronic MAR has improved the accuracy of narcotic counts and the integrity of medication management. This tracking of entries minimizes medication errors, contributing to safer and more reliable care delivery.
- ◆ **Care Plan Audit Efficiency:** ECP's care plan summaries enable staff to audit care provided versus billed services, identifying billing discrepancies such as undercharges and overcharges. Aligning care with billing by level of care (LOC) has streamlined financial operations and ensured fair billing practices.
- ◆ **Efficient Nursing Assessments:** ECP has expedited nursing assessments, enhancing efficiency and job satisfaction by reducing staff complaints from every 20 minutes to zero. This has allowed Cameron, the CSO, to work without interruptions from nursing assessment issues.
- ◆ **State Compliance and Documentation:** With ECP, SAL digitized compliance documentation, previously stored in physical binders. This reduced paperwork and allowed SAL to maintain records digitally, ensuring efficient compliance with regulatory standards.
- ◆ **Enhanced Daily Rate Monitoring:** In the course of a year, there was a 12.4% increase in level of care revenue per resident per day, enabling SAL to capture care charges and contributing to overall financial health.
- ◆ **Invoice Generation:** The transition to ECP reduced the time required to generate invoices by approximately two hours per month per accountant, resulting in substantial time savings across the team.
- ◆ **Automated Invoices:** Previously, executive directors (EDs) manually emailed or hand-delivered invoices. With ECP, invoicing is automated, allowing invoices to be distributed with a click, saving EDs 38 hours each month.
- ◆ **Increased Revenue Capture:** The clarity ECP offers in displaying accounts receivable has enhanced SAL's revenue capture, thanks to its intuitive interface and detailed reporting capabilities.
- ◆ **Revenue Projection and Management:** The ease of reporting with ECP allows for more accurate revenue projections, enabling SAL's team to reliably forecast financial outcomes. This aids decision-making processes, such as determining the number of move-ins needed or expense reductions to meet financial targets.

## Challenges and Pitfalls to Avoid

While the implementation process was largely successful, like any adoption of a new software, SAL and ECP had to proactively identify obstacles or challenges that could be presented along the way.

- ◆ **Building a Strong Partnership:** Be a valued partner to your software provider, not just another number.

Brody Jardine, chief financial officer, noted, "A key factor in SAL's decision-making was finding a software provider that acted as a partner, not just a service. We really felt like we had a true partner in ECP. The CEO, head of implementation, and lead sales account engineer all came to meet with us and that is what drew us to ECP. ECP hears our needs and we weren't just another number on the wall like other providers. The biggest success story of this whole thing is the partnership."

- ◆ **Prepare Teams for Change:** Transitioning from one system to another requires carefully managing team dynamics and expectations. Early on, SAL's leaders held meetings to discuss the pros and cons of the existing system and the improvements team members prioritized. Involving the team in this process helped in managing resistance to change. By the time the decision to switch to ECP was announced, there had already been substantial buy-in.
- ◆ **Extensive Vendor Evaluation:** The decision to choose ECP over other providers was not made lightly. SAL invested approximately 40 hours in demos and meetings with various vendors, which provided a deep understanding of what each could offer. This comprehensive approach ensured that SAL was well-informed and confident in its choice.
- ◆ **Plan for Data Migration:** Work with your software vendor to understand the plan for data migration and make sure you are both aligned on the goals. The mass migration of data from SAL's legacy systems required detailed planning and attention to ensure accuracy, so that SAL's team was ready on the week of go-live. ECP excelled in this area, making the process as smooth as possible for SAL's team.  
  
Cameron Harris, chief sales officer, described it as "probably one of the best implementations they have done."

- ◆ **Integration Challenges:** Assisted living communities often use multiple suites of software that may not communicate with each other. In this instance SAL decided to use ECP for all of its resident-centric workflows (CRM, eMAR, EHR, billing) so that it could avoid the integration challenge for its most mission-critical workflows. SAL also successfully pursued integrations to other, less resident-centric systems such as its general ledger.
- ◆ **Growth and Scalability:** Make sure the vendor you are working with is innovative and grows to meet your business needs. Ensure they can accommodate increasing number of residents and users, and display an innovative culture. Regularly evaluate the vendor's development roadmap and updates to ensure their solutions can scale with your business's growing demands and evolving industry standards.
- ◆ **State Regulations and Compliance:** Make sure your software can customize to meet specific regulatory requirements, has sufficient data security measures, and provides adequate training for staff. This will help you remain compliant within your state and also mitigate citations.