

Case Study: Increasing Efficiency and Engagement through Microsoft Teams

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Categories:

- ◆ Staff Efficiencies
- ◆ Improved Communications
- ◆ Reduced Costs

About the Organization

Organization Name:

Cypress Living

Main Contributor:

Joe Velderman, Vice President
of Innovation

Organization Type:

Home Health / Home Care
Continuing Care Retirement
Communities (CCRC)

Other Partners:

ProviNET Solutions
Microsoft

Organization Description

Cypress Living is the architect of innovative senior living solutions in Southwest Florida. Inspired by the forward-thinking clients we serve, Cypress Living tailors care services to anticipate, meet, and exceed the lifestyle needs and expectations of each individual in their homes and in our communities.

As part of our efforts to bring new ideas to Southwest Florida, Cypress Living has developed Cypress at Home, an in-home service that allows older adults to thrive while aging in place. Within this home care model, we can provide high-quality services and solutions to enhance everyday lives.

We are also expanding the resources and capabilities of our flagship community, Cypress Cove. Right now, leaders in the field of senior living are collaborating on the design of The Oaks at Cypress Cove — a brand-new neighborhood of luxurious apartment and villa homes that will sit on 12 scenic acres in Fort Myers, FL.

The ultimate mission of Cypress Living is to empower older adults to lead rich, engaged, and purposeful lives.

Project Description

As Cypress Living and its affiliate organizations continue to grow, the organization was looking for a forward-thinking platform that would allow it to effectively and securely communicate with staff members in a manner that was relevant and timely. Cypress Living sought to leverage an emerging tool that was already built into the Microsoft Office365 suite called Microsoft Teams. As a unified communication platform, Teams provides voice, video, and instant message capabilities within a single app, and includes dozens of integrations with commercially available apps. In order to obtain a successful project outcome, Cypress Living partnered with ProviNET Solutions, a certified implementer of Teams.

System Type

- ◆ Microsoft Office 365 (E3, E1, & F3 Licenses)
- ◆ Microsoft Phone System with Domestic Calling Plan
- ◆ Microsoft Audio Conferencing
- ◆ Microsoft Bookings
- ◆ Logitech Meeting Room
- ◆ YeaLink Teams Enabled Phones

Describe System Embodiment

ProviNET Solutions worked with Cypress Living to develop a plan to fully embrace the connected tools within the Microsoft Office365 suite. ProviNET Solutions assisted in the deployment of Teams to all workstations within Cypress Living at the same time that the legacy digital phone system was replaced. The organization was able to port existing phone numbers to the Microsoft cloud PSTN service and route external calls to internal recipients and auto-attendants. In addition, Cypress Living leveraged ProviNET Solutions' expertise to replace its conference room phone with the Logitech Meeting Room system, which was designed to work seamlessly with Teams.

"We had really high expectations for the transition to Microsoft Teams;" explains Joe Velderman, vice president of innovation, "we knew we were trading in an old bicycle for a high-performance roadster."

Initial adoption of the Teams platform was gradual. The biggest challenge was to adopt a new mindset around basic functions. While Teams has every capability that the legacy phone system had, the process for completing tasks looked a little bit different. "Simple tasks like transferring a call from one user to another needed to be intentionally thought through and we needed to spend some time with users training them on these new processes," shares Tim Bakker, solutions architect, ProviNET Solutions.

Today, Cypress Living is fully bought into Teams. The organization has continued to find new ways to leverage the Teams platform for a host of capabilities. "We're using Teams for way more than instant messaging and phone system," says Velderman. "Teams has allowed our staff to effectively stay connected while working remotely. We host daily Teams meetings using voice, video, and screen sharing. We've also started offering telehealth services through Cypress at Home based on the Teams platform." Cypress Living CEO Troy Churchill is maybe the organization's biggest embracer of the Teams platform. "I don't know where we would be without Teams," exclaims Churchill.

Business Model

Cypress Living sits as a central support organization for Cypress Cove (CCRC) and Cypress at Home (aging life care management, home care, home health). Many of the services that the three organizations provide are private-pay services, but there is some ancillary private insurance and Medicare reimbursement for services.

Implementation Approach

For nearly three decades, ProviNET Solutions has been providing the senior living field with innovative technology solutions that enhances their overall IT infrastructure. For the last several years, Cypress Living has been partnering up with ProviNET Solutions for all of their technology investments.

Since Teams is such a new platform, Cypress Living recognized the need to bring in some expert assistance from an organization that had deep experience with Office365, Teams, and some of the other Microsoft subscription services. For this, Cypress Living partnered with ProviNET Solutions (Tinley Park, IL) who is also very familiar with senior living and home and community-based operations.

Cypress Living was the first organization to go live with Teams. This top-down approach was important to stress the importance of buy-in of the Teams platforms for other users within the organization. "Our impetus to implement at Cypress Living first was two-fold," explains Velderman. "We needed to replace an aging, and frankly failing phone system; but we also wanted the senior leadership of the enterprise to experience and begin to use this tool first to build excitement around the platform for the rest of the enterprise."

The second phase of the implementation included all of Cypress at Home. Cypress at Home has a central support staff of about a dozen full-time staff members with more than 50 remote caregivers who are scheduled to provide services for customers throughout the week. Cypress at Home licensed each of the central support staff team member with an Office365 E3 license and phone system capability, but then also licensed each of the caregivers with an F3 (front-line worker) license.

"It was important for us to give each of our caregivers a secure communication platform back to our central support team," says Velderman. "Teams is a HIPAA-compliant, encrypted platform and so we tell our caregivers that it not only 'okay' to send Protected Health Information (PHI) and Personally Identifiable Information (PII) through Teams, it is encouraged. Today, we have caregivers sending instant messages to Advanced Practice Registered Nurses (ARNPs) inquiring about conditions or situations to get the highest level of clinical advice we can give them in real-time."

Cypress at Home isn't just using Teams for unified communications. The organization has paired the Microsoft Bookings tool (available through Office365) to allow clients to schedule telehealth visits using the Microsoft Teams platform. "Telehealth was always on our roadmap for Cypress at Home, but, with COVID-19, that need became much more urgent," says Velderman. "We found that we could very quickly, and inexpensively, offer telehealth visits through Teams; a platform that our ARPN's and Physicians were already very familiar with."

The final phase of the Teams implementation is to roll out all of Cypress Cove on Teams, a process that is still underway. "Our goal is to have all of the staff members at Cypress Cove embrace Teams the same way that Cypress Living and Cypress at Home have," explains Velderman. Cypress Cove will also be seeking to license front-line workers with that very affordable F3 license to give each person within the organization a platform to send and receive communication.

Advantages to the Approach

Microsoft Teams offers many different advantages. After the implementation, ProviNET Solutions provided Cypress Living the ability to take advantage of:

- ◆ A single Office 365 and Microsoft Teams platform for everyone.
- ◆ A unified communication toolset that could be used to reach employees instead of a tiresome silo of emails, voicemails, texts, etc.
- ◆ An organized phone numbering system. Beforehand everyone would have different numbers, which caused a mass interruption to the communication process.
- ◆ Incoming call transfers, which receptionists use to connect calls to other associates who can pick up the call both in the office or out in the field.
- ◆ Improvement of communication across Cypress Living, which better served their senior living residents. Staff now have voice, video, and secure internal text capabilities.
- ◆ The modern cloud-based platform, which has simplified moves, add, and changes to the system.
- ◆ Flexibility for the Cypress Living to more readily work from almost anywhere with a consistent toolset and experience.

Outcomes

During the implementation, and after the project was completed, Cypress Living saw staff efficiency and engagement increase. "Our people want to feel like they are 'in the know,' and Teams gives us the ability to communicate with them through a means that they are familiar with. I'm totally impressed with how well even our front-line staff members are using and embracing the Teams platform," proclaims Velderman.

Additionally, Cypress Living and Cypress at Home have realized a reduction in their monthly telephone expenses after migrating to Teams.

"Our organizations would not have been prepared for the COVID-19 situation if we didn't have Teams," says Churchill. In the last 90 days, the Cypress enterprise has exchanged nearly 30,000 Teams messages with one another, made more than 3,500 1:1 phone calls with fellow associates, and hosted nearly 200 virtual Teams meetings. "Teams has been a platform that we've come to depend on through COVID-19. It's been a tool that we're using to fight against this menacing virus," explains Joe Velderman.

Challenges and Pitfalls to Avoid

As with any major project, ProviNET Solutions has learned from several challenges during implementation. When you are transitioning from a legacy system to a more modern one, such as Microsoft Teams, there are several items that need to be considered. Planning is crucial, and it is important to understand the incoming call flows for each group. Currently, Microsoft Team's Phone System has some minor limitations, and understanding these call flows is important prior to implementation to alleviate risks and potential setbacks.

Lessons Learned

Teams provides a large number of tools for unified communication. Inevitably, end-users will have different preferences and methods in which they adopt to the various tools. It was important for ProviNET Solutions to make sure Cypress Living had the proper training on Team's tools before, during, and after the implementation. After proper training and self-experimentation, the acceptance of the new tools increases once end-users feel comfortable and realize how it can help with their daily tasks.

Advice to Share with Others

Executive Sponsorship

The transition from a legacy phone system to a modern system can be challenging. Therefore, it was crucial for ProviNET Solutions to provide the Cypress Living executive leadership team with the pertinent information to assist in the easing and understanding of the transitional process. This will help the team better explain to their employees the importance of the switch and how, at the end of the day, it will yield more efficient results.

Engage Your End-User

Cypress Living discovered that by updating their phone system it would help to improve their overall collaboration between their teams. However, before a decision can be made, end-users must be engaged. ProviNET Solutions recommended that Cypress Living consider their end-users' concerns, because at the end of the day they would be the ones utilizing the product the most. Teams is an elaborate product that offers a variety of means for accessing its features. A user can either use a traditional desktop

phone, use an application on their computer, their mobile phone, or a mixture of all three. Giving staff options will make them more comfortable with the platform and further enhance their abilities.

About ProviNET Solutions

ProviNET Solutions is a premier information technology solutions provider that delivers comprehensive services for senior living and post-acute care organizations. Customers are given tailored IT solutions they need to seamlessly manage their community through the combination of enterprise-class IT infrastructure, premium 24/7 service desk support, and proven industry solutions for point of care and mobile technologies. Healthcare organizations can take advantage of ProviNET's technology consulting resources for strategic planning, clinical and financial implementations or EHR optimization efforts.

ProviNET's reputation for building robust, high-performing, customized solutions with reliability and responsiveness that providers can trust is built on more than 30 years of experience. Contact ProviNET today to learn how your IT can become Powered by ProviNET.