BT Partners and Domo Help GLM Chart a Course of Continuous Improvement

Industry
Senior Living

Client Since
2022

Solution
Domo

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Great Lakes Management

Stephen Pagh
Executive Vice President
Great Lakes Management

Great Lakes Management Company (GLM) manages 2,500 senior living units across three states. The company provides a wide range of services designed to help owners build, launch, and manage thriving communities. Staying ahead of the finance and operational aspects for a complex, multi-entity operation like GLM is challenging, so the organization invests in tools and services that give it a competitive edge. That's why GLM partners with BT Partners' Executive Analytics team.

Complex Corporate Structure Complicates Data Handling

"We have 50-plus entities, and each runs multiple software applications, including accounting, HRMS, CRM, and patient care," explains Stephen Pagh, Executive VP at GLM. "Each system is good at reporting its data for one location, but we need to look at all our data across all our locations. That requires a sophisticated business intelligence (BI) platform."

Domo Excels Over Power BI

Pagh said the company initially implemented Microsoft Power BI but quickly determined they needed a tool that was easier to use and simpler to host.

"Domo fit the brief. With Domo, we don't need a separate data warehouse, and we don't have to arrange expensive hosting. Plus, Domo has a friendly user interface that makes it easy to learn and use. BT Partners Executive Analytics team are Domo experts, so we picked them."

Pagh wanted to start with a quick win with Domo to build confidence across GLM's management team. "BT Partners worked with us to help us select a defined set of reports—a clean scope of work."

BT Partners went to work to deliver on the proof of concept. "We were impressed with their knowledge and skill integrating all our applications. It led to a quick win and we've been building on that win ever since."

Democratizing Data

GLM uses the data views to share critical financial and operational metrics with the communities' management teams. "Something we've had success with is displaying the percentage of overtime hours worked, ranked across locations," Pagh says. "Management teams see this and work to align their overtime numbers with the rest. It increases accountability."

One of the first projects GLM and BT Partners worked on was automating a set of asset owners' reports. The comprehensive reporting package combines data from four different applications and was being prepared manually. "Our Regional Managers spent over 20 hours a week pulling together these reports, entering them into Excel, and getting them out Monday mornings," Pagh explains. "Inevitably, there were errors and outdated numbers."

Now, Domo automatically compiles and distributes the reports each Monday at 9:00 AM—for a total time savings of 80 hours each month. As a result, the Regional Managers are free to spend more time on site, building relationships and strategizing additional operational efficiencies.

Catching Anomalies Before They're Issues

Individuals who work in the senior living space are among the most caring and conscientious. They're also tasked with much responsibility. Domo delivers real-time access to decision-making data that helps ensure they can do their jobs accurately and efficiently.

"Consider a business office manager at a senior living community, for example," Pagh relays. "Of course, they want to bill each resident correctly and do their job to the very best of their ability. However, senior living billing structures are highly complex, and mistakes happen. With Domo, we have systems in place that monitor the various types of billing errors that can happen and flag them on the user's dashboard. They're the first to see the issue and can fix it immediately. It empowers the staff and boosts best practices within the organization."

This same type of data monitoring allows GLM's management team to instantly identify and diagnose other discrepancies or disparities in the data—before they become an issue. "Our staff all have Domo dashboards that continually display the KPIs and metrics that matter to their job," Pagh explains.

"We worked with BT Partners to set parameters on various metrics, and when there's an outlier, we see a red dot on the dashboard. Then, a simple click on the number shows us the underlying data, and staff can set out to make it right. Without Domo, we might have to run four reports across two applications to get the same result."

Creating a Data-Driven Culture

BT Partners and Domo are helping GLM create a data-driven corporate culture, one fueled by quick access to up-to-date business metrics. "We're using our data to help us make continual improvements," Pagh says. "We have objective measurements of our performance that motivate us to do better."

He cites the organization's ability to monitor sales staff performance as an example. "It's tough to set higher expectations on an individual salesperson without sharing with them what others are achieving. We can set benchmarks based on actual performance, resulting in improved performance across the board."

Better At What We Do

Pagh says he meets with with BT Partners each week to consider new projects and set priorities. "These are always productive talks—BT Partners speaks our language. They clearly understand the senior living space and are experts with Domo. Their consultants are brilliant in how they grasp a situation and execute a solution."

In the first year, the organization's focus was automating manual tasks. Now, it's shifting to operational efficiency by analyzing metrics such as staffing and pricing. "We've moved the focus away from looking for problems and on to looking for opportunities," Pagh concludes. "Humans are in the equation, so there will always be errors, but we catch them while they're fixable. And we use what we learn to build superior practices, procedures, and workflows that make us better at what we do."