



You can meet your goals, even exceed expectations, and not meet the original plan.

Client Profile

A non-profit in the mental health industry, it serves approximately 4,000 patients throughout the state of New Jersey. It was established over 50 years ago and has a current workforce of about 400 employees.

From the start, their goal was to transition to an outcome-oriented model, a strategic direction that focuses on the results and impact of their services rather than just the time spent on them.

They wanted to create a knowledge infrastructure that enables them to generate reports with essential elements (such as KPIs—Key Performance Indicators and OKRs—Objectives and Key Results) and harness their information assets to make better decisions and ensure a sustainable future for their organization.

Background

With a keen eye on the evolving landscape of their industry, the client proactively recognized the shift from a billable time model to an outcomes-oriented standard. They embarked on a journey to meet this new challenge, investigating data techniques and IT infrastructure and demonstrating their readiness to adapt and thrive.

They discovered the value of reports but faced challenges with time-consuming manual processes, data compilation errors, and decision fatigue. This highlighted the need for a more efficient data management system to streamline operations.

To overcome this challenge, the client sought solutions that allowed them to generate reports automatically. The client also faced challenges regarding costs, complexity, and the efforts of training staff on new tools.

The Path

The Data Storytelling team provided strategic guidance to the client, offering expertise in data management and reporting. They helped build a robust reporting environment, understand KPIs, and streamline data management processes. Conducted due

diligence and discovery to align tools with client needs through structured interviews and workshops, enhancing decision-making capabilities.

Three principal questions that led our journey were:

1. What about the original model works best for your team?
2. What elements feel overwhelming, too expensive, or too time-consuming?
3. Which components set a good foundation for growth and improved decision-making for your department?

The Solution

Instead of expensive cloud-based options, Data Storytelling recommended a different kind of data store—a tailored solution that leveraged the client’s existing infrastructure and skills.

The solution included a centralized data repository, automated data collection and processing, and customizable reporting tools. It did not require the purchase of a new pricey tool or additional monthly subscriptions and training costs.

The Takeaways

1) Setting Clear Goals

The client’s goal remained solid throughout the process: *to improve their data management processes and make more cost-effective decisions*. This project's most significant impact was uncovering a lower-cost route to achieve their goal and demonstrating fruitful data management opportunities and potential outcomes.

Data Storytelling demonstrated that they didn’t need a cloud-based solution's costly bells and whistles to start worthwhile reporting.

By taking this approach, the client managed to save hundreds of thousands of dollars through:

- Choosing not to invest in a pricier tool with unnecessary features that did not match their needs,
- Steering clear of monthly subscription expenses, and
- Cutting down on multiple hours of staff training.

2) Bespoke solutions can be cost-effective



The client's success story is a testament to their resourcefulness and adaptability. They leveraged all their resources and talent to create a solution with a practical process and existing tools.

3) A needs assessment prioritizes data owners and users

Project management success stemmed from thoughtful decision-making. Leadership prioritized understanding needs over new tools, showcasing effective decision-making in data management.

Amending the goal of cloud hosting involved reviewing client needs, consulting with client teams, and reassessing tools. By adopting this strategy, the client realized they had the required data and shifted to a reporting model for informed decision-making.

Conclusion

Data Storytelling has a unique style of curiosity, acting as an impartial evaluator to identify missteps and gaps in processes. Clients who embrace Data Storytelling's approach often streamline operations and save money.

It is common to find that the initial goals or desires set out may not align with the eventual outcomes. This discrepancy can be attributed to various factors, including unforeseen circumstances, evolving priorities, or the influence of external variables. However, this divergence does not necessarily signify failure or a misstep. Sometimes, the path taken, with its obstacles and adaptations, can lead to a result that aligns more closely with the project's overall vision.

Our client's story is a beacon of optimism for nonprofits. They successfully transitioned to an outcome-oriented model, a significant milestone contributing to their organizational growth. This achievement underscores the potential for all organizations to embrace change and thrive in a data and technology focused world.