Yellowfin

Case Study
Lancashire Care NHS Foundation Trust

Summary

The Lancashire Care NHS Foundation Trust had a mission to utilize reporting and analytics to increase performance and efficiency. Using Yellowfin's BI solution, the Trust has been able to:

• Deliver Mobile BI to its 6000 field-based clinicians to improve the quality and efficiency of patient care

• Develop a Balanced Scorecard to provide senior Trust executives with a comprehensive overview of Trust performance

• Create a single trustworthy source of information for its reporting, allowing Lancashire Care's BI team to avoid duplication of efforts and build new BI content quickly

Company

Lancashire Care NHS Foundation Trust is the largest provider of Mental Health and Community Care services in Lancashire, serving 1.5 million people across an area of 3,075 km². Lancashire Care is a Trust that falls under England's publicly funded healthcare system
– the National Health Service (NHS).

The Trust is one of the largest providers of Mental Health and Community Care services in England. It has almost 200 different services, 900 teams and approximately 7000 members of staff.

Challenge

Because 97 percent of Lancashire Care's business is related to the provision of community-based care, its clinicians are frequently away from their desks – continually on-the-go visiting clients.

Previously, the Trust's community services staff worked remotely via a paper-based diary system of record keeping, requiring them to travel back to a dedicated base to re-enter the information through a desktop PC. Consequently, Lancashire Care embarked on a program to transition the majority of its services workforce onto tablet devices, allowing them to directly create, share and consume information via its online networks remotely.

This required a flexible Business Intelligence (BI) solution, which large numbers of non-technical staff could easily utilize – primarily via mobile devices – to independently access and share important client and Trust data.

Lancashire Care formerly used Microsoft Reporting Services 2008 R2, in conjunction with Performance Point 2010, as its front-end data visualization layer for desktop-based reporting. However, Lancashire Care found these tools to be incompatible with mobile devices, and therefore unacceptable for the remote delivery and consumption of data.

Solution

After evaluating a number of BI solutions for mobile devices, Lancashire Care identified Yellowfin as "the easiest to use", making information "highly consumable through its interactive charts and dashboards", via native applications for the iPhone, iPad and Android platforms, Web-browser or HTML 5 integration.

"When evaluating the different Mobile BI solutions on the market, I often found that each product would have its own strengths, but would come with equal weaknesses," said Lancashire Care Business Intelligence Manager, Mark Singleton. "However, Yellowfin was different. No matter how hard the team challenged and pushed the product, it always delivered."

Device independence and author once, consume anywhere content
Moreover, Yelllowfin's approach to Mobile BI supports true device independence. Services personnel can run and access all of Yellowfin's core reporting and analytics capabilities straight from their mobile device of choice without any extra training.

Additionally, Trust field staff can gain the benefits of fresh data immediately, as any BI content created via the browser is immediately and securely available on any mobile device. Information permissions set-up via the browser carry over to mobile devices, ensuring that information delivery remains personalized and secure.

"Because we don't need to re-create or repackage content for mobile delivery, this author once, consume anywhere capability will save Lancashire Care vital IT resources moving into the future," said Singleton.

Subscriptions and alerts
Subscriptions and alerts also allow Trust services staff to remain up-to-date with the latest information pertinent to their job function, while enabling them to manage their time efficiently.

"Whilst we're developing an information culture within the Trust, we don't want managers and clinicians spending too much time looking at reports – especially when there's no action required" said Singleton. "Yellowfin's subscription and alerts functionality lets our users stay on top of the information that matters to them, without becoming overwhelmed by the number of reports."

Cost effectiveness
Due to Lancashire Care's goal of democratizing its data – making it available to its broad range of services personnel – attaining a cost effective BI solution was important.

"It quickly became apparent how expensive most Business Intelligence solutions were to roll-out across large organisations," said Lancashire Care Director of Finance, Dave Tomlinson.

"We wanted a solution which could start small and then be scaled up without giving us headaches about cost. With Yellowfin's value for money pricing structure, we knew we could do just that."

Collaboration
Yellowfin's collaborative features, including discussion and annotation functions, allow Lancashire Care's highly dispersed workforce of clinicians and managers to keep in contact with each other, as well as mission critical data, by enabling them to add commentary to BI content and share it with select users.

"Yellowfin lets users add their own insights to data, to broaden the knowledge others obtain from viewing the same information," said Singleton.

Technical environment
Lancashire Care host Yellowfin on a cluster of enterprise standard servers to ensure high performance and continuous availability.
The Trust also has a dedicated Yellowfin development environment, allowing the BI team to produce new – or modify existing – content, without affecting live reports or dashboards.

The Trust has created its own Data Warehouse using SQL Server 2012, and has a range of OLAP cubes sitting on top for reporting, enabling power users to query the data directly.

Results

Yellowfin has enabled the BI team at Lancashire Care to create more consumable reporting more efficiently, and allowed its clinicians and management to easily access and understand vital personalised information in real-time.

Improved IT efficiencies

As a 100 percent Web-based BI solution, Yellowfin has allowed Lancashire Care to create a single trustworthy source of information for its reporting. Therefore, Lancashire Care's BI team can confidently re-use previously created content, enabling new dashboards to be built and published within minutes, rather than hours or days.

"Previously I found the development team creating similar reports with very slight variations," said Singleton. "Eliminating this unnecessary duplication of efforts, and improving reporting efficiencies, is going to be essential with increasing demand for our BI services in challenging economic times."

Independent information access and exchange on-the-go

Community-based services personnel can now independently access and share the information they need to boost individual and collective performance, as well as improve the quality and efficiency of patient care.

"With Yellowfin, our services staff understand their performance, and can thereby enhance the care they provide, by accessing and interacting with relevant information directly from their tablet devices in real-time, wherever and whenever necessary" said Singleton.

Beyond Mobile BI

Whilst Lancashire Care originally began evaluating Yellowfin for its Mobile BI proficiency, the Trust quickly found its core Web-based application was also highly intuitive within a desktop-oriented environment.

"What started as a Mobile BI evaluation soon got me re-thinking our desktop strategy," said Singleton. "We're now moving our existing desktop reporting over to Yellowfin."

Enhanced management visibility

Using Yellowfin, the Trust has also developed a Balanced Scorecard – pulling together clinical, financial, human resources and quality control information – to provide Trust executives, management and Board of Directors a comprehensive picture of current Trust performance.

"Enabling management with more timely and accessible information will improve efficiency, performance and most importantly quality within the Trust," said Tomlinson.

"Yellowfin – with its commentary, discussion and PowerPoint-like presentation module, Storyboard – is a perfect BI tool for management. Extra insights from across the organizations can be added to raw figures, to help the Trust's knowledge grow quicker and deeper than ever before."

User adoption

Like many unfamiliar technologies, the BI team at Lancashire Care was initially wary of Yellowfin. That attitude soon changed.

"At first, the team was very wary and sometimes negative towards Yellowfin, often challenging it and comparing functionality to the existing BI technologies they knew and loved," said Singleton. "Luckily, it was only a few weeks before all this started to change, with staff soon singing Yellowfin's praises about what it could do, over and above the other technologies.

"Like Gartner, we can see this emerging technology going far in the market, and that's why we've decided to back it early."