

WIRRAL COMMUNITY NHS FOUNDATION TRUST CASE STUDY:

Wirral Community NHS Foundation Trust boosts efficiency and streamlines management meetings with Yellowfin.



Wirral Community
NHS Foundation Trust

“Yellowfin has been invaluable in helping us drive efficiency, enabling the Trust to substantially reduce the number of meetings required to review performance figures, as managers now have access to insightful real-time data and analysis.”

Edd Berry,
DEPUTY DIRECTOR OF FINANCE AND
BUSINESS INTELLIGENCE,
WIRRAL COMMUNITY NHS FOUNDATION TRUST



Background

Wirral Community NHS Foundation Trust provides high quality health and social care services to the population of Wirral and parts of Cheshire and Liverpool. The Trust has developed an excellent clinical reputation, employing over 1,800 members of staff, 90% of who are in patient-facing roles. Each year, the staff at the Trust deliver over 1.1 million face to face sessions in many settings including clinics, health centres, GP surgeries, schools, and people's homes.

Challenges

To deliver its services to the Wirral population, the Trust relies on both the expertise of its staff but also on information technology systems that help it manage a wide range of activities including direct patient care, facilities management and staffing schedules.

In common with much of the NHS, Wirral is continually looking at ways to raise efficiency and improve patient outcomes while saving public money. To this end, the Trust's Finance Team invested in a new costing system, and initially began to look at ways to improve financial reporting to streamline processes and deliver a better service.

Berry and his team tested several BI products before selecting Yellowfin. He says: “When we evaluated Yellowfin, it was clear that it could be used for finance, but we knew it would also work across the entire Trust.”

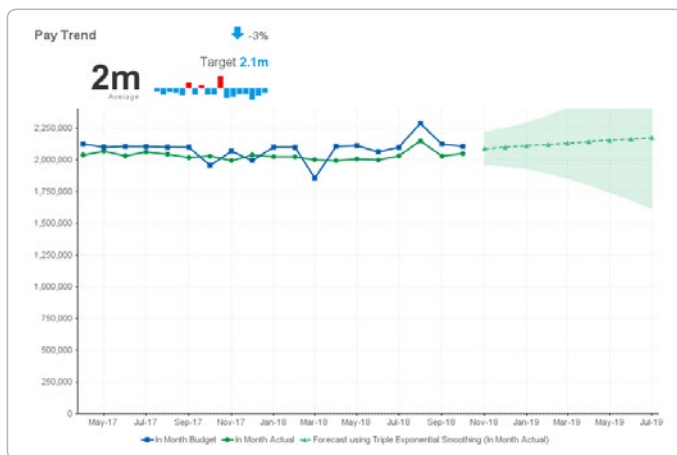
Berry says that Yellowfin was less expensive than competitive solutions yet offered better support and a more flexible licensing policy, which allowed the Trust to deploy it to more users than was otherwise possible with their legacy BI tool.

Alongside comprehensive reporting and dashboarding capabilities, Berry felt the geographic information system (GIS) mapping in Yellowfin made it really stand out. He comments: “As a community trust, we work across multiple sites. We aren't just one hospital with our services centered in one place. We felt it would be really useful if we could visualise where the Trust was delivering its care. I think ease of use was another huge factor” says Berry. “In terms of training requirements, Yellowfin was substantially easier to use, and quicker to pick up than other competitor solutions.”

The Solution

Over the last few years, the Trust has expanded its use of Yellowfin far beyond financial reporting. In addition to their costing system, Yellowfin connects to their datawarehouse, and has live feeds from key data sources such as SystmOne, a shared Electronic Health Record (EHR), Datix - a patient safety application, staff resource management, and a number of other systems that support administrative services including wheelchair management and sexual health. Yellowfin is now used by approximately 150 managers across the organisation.

A recent project, initiated by a newly appointed Chair and the Chief Executive of the Trust, was: "To become as lean an organisation as possible, but with the Board having the necessary assurances in place," Berry explains. "We needed our BI tool to give us all of the information we needed in one place, so everyone could understand where we are meeting targets or going off track. We set a goal to provide access through mobile devices like iPads as well as desktops with the aim of reducing the number of meetings where the organisation has to pull together senior managers."



Example report showing budget vs actual pay.

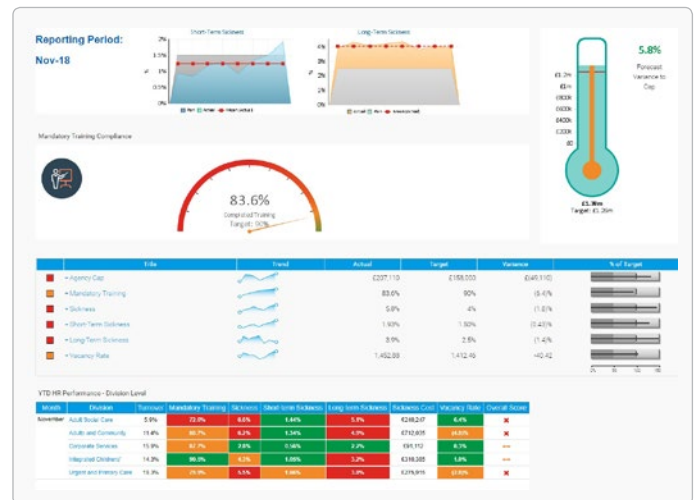
With Yellowfin acting as a centralised portal for the project, everyone now has an organisational view mapped out. It works for the Board and the Executive Team, but it's designed for managers at all levels, as you can drill right through to individual sub-teams within a service, to really granular levels. The idea is that any budget holder within the Trust, regardless of the site of service, will have access to their budget and the detail to make data-driven tasks much easier to manage.

Benefits

This latest project has delivered an entirely new set of dashboards that have helped the Trust move to a much lighter meeting structure. Berry states: "Yellowfin has been invaluable in helping us drive efficiency, enabling the Trust to substantially reduce the number of meetings required to review performance figures, as managers now have access to insightful real-time data and analysis."

The review process has also helped the Trust to standardise all its service naming conventions within the organisational structure with the Yellowfin portal acting as a source of truth for the entire organisation across disparate departments and sites.

The list of incremental improvements that have been enabled by using Yellowfin is substantial: "For example, managers don't have to wait for HR to bring out the sickness absence and staff turnover reports, and managers don't have to wait for Finance to do a costing report," says Berry. "Yellowfin allows us to collate it all in one place and staff now know that from a certain day in the month, it will all be there."



Example dashboard with test data illustrating how the Trust monitors sickness, training and vacancies.

"Because the data is more tightly integrated now, a manager can examine the data and see, for example, if sickness absence has gone up, then drill down to see how many agency staff have been used and drill down further to see the invoice from the applicable company. Before, this would have been a complex process using multiple systems - and now, we can do this with Yellowfin via an iPad" Berry concludes.

As the Trust continues to roll out Yellowfin and examines new ways to utilise its BI capabilities, Berry is positive about the future. "We're currently working on delivering statistical process control (SPC) charts through Yellowfin, so we can better understand the natural variations in our performance and represent it effectively. And we're really excited about the additional collaboration features, like Yellowfin Stories."



For more information on Yellowfin, visit www.yellowfinbi.com