

Genea



Genea deploys QlikView BI for patient and practice management analysis

Since 1986 Genea has been leading the world in fertility services. Formerly known as Sydney IVF, the organisation was one of the earliest pioneers of infertility and IVF (in vitro fertilisation) treatments. By 2012 the organisation's services had grown to include not only IVF but genetic testing, pathology services and stem cell research. Its embryo screening services, involving more than 170 chromosome and genetic conditions, have made Genea one of the most successful pre-implantation genetic diagnosis clinic in the world.

Today Genea has locations across Australia and in south east Asia. It remains an unlisted public company with over \$60 million in annual revenues and in excess of 300 employees.

A new system brings new needs

In 2009 Genea made extensive changes to its information systems. The company introduced BabySentry, a fertility database management system to help manage every aspect of a patient's involvement with the clinic including admission, treatment cycles, embryology and lab results. The software made it possible for the organisation to at last link all data about any given patient across disparate applications simply by using a unique patient identifier.

The deployment was a success in terms of patient management, improved processes and streamlined workflows but there remained one stumbling block. Historically a number of the organisation's reports had been produced using Microsoft Access. BabySentry however involved many more tables and was a lot more complex than Genea's previous system. As a result it was no longer possible to rely on Microsoft Access.

Over the next 12 months this restriction became a gnawing problem for Genea's labs. Reports were essential for viewing and analysing individual patient results, identifying fertility trends and understanding patterns resulting from treatment. Jon Taylor, Business Analytics Manager at Genea notes, "We had to find a way for the labs to more easily access and analyse the information being put into the system."

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WORLD LEADERS IN FERTILITY

At a glance

Industry

Health services

Problem

Genea needed to find a way to easily analyse and report on the patient, treatment and business data held in its information systems beginning with its patient management system and extending through to the organisation's financial management system.

Solution

- QlikView
- Microsoft BI

Benefits

- The Microsoft BI solution is providing management with insights and monitoring key performance indicators across all areas of the business including lab, patient, HR, IT and financial activity.
- The additional reporting and analytic capabilities are allowing Genea to better realise the value of the extensive information stored in its patient management system.
- Non-technical staff can readily access and analyse patient data as required rather than relying on others to prepare reports for them.
- As new reporting needs arise, new dashboards and solutions can be built within days rather than weeks.



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At the same time Genea's finance manager was beginning to question the efficiency of his department's spreadsheet-based financial reporting, recognising that as the company grew, it was becoming increasingly time-consuming for the finance team. Instead, he wanted a solution that would allow more interactivity with the information. "I wanted to move away from the model of a finance department pushing out reports, to one where users could pull the information for the themselves," Taylor explains.

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The search for the right solution

Taylor realised that Genea required a business intelligence (BI) solution, one that could draw upon all of the company's systems to provide wide-ranging analyses and reporting of medical and business data, including historic, current and predictive views.

"I attended demos and researched quite a large spectrum of BI solutions. QlikView appealed because I liked the concept of seeing is believing; that Professional Advantage could build a proof of concept to show us what was possible. It resonated with the evidence-based ethos of our company," Taylor says.

He points out that QlikView offered a number of other important benefits over competing BI products. "It was affordable and scalable. I particularly liked the intuitive, non-technical feel that it offered to users because not all our staff are comfortable with IT. Then there was the fact that you could develop solutions in an evolving manner. You don't need to have a clearly articulated specification when developing in QlikView. You can just develop a piece, see what the feedback is and develop further." It's a development philosophy that is particularly suited to BI projects, where users frequently can't identify their analytic needs until they first see what is possible.

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"The final appealing aspect," Taylor says, "was the fact that it could be developed and maintained in-house. It didn't require a particularly steep learning curve, especially when compared to some other BI solutions."

The beginning of the BI journey

With the software sorted, Genea needed to find a partner to help with deployment. When it came time for the BI solution we actively sought out Professional Advantage. I had worked with them before and felt they were genuinely interested in partnering with us. They seemed very diligent and we liked the company's way of doing business," he explains.

Although Taylor had identified numerous BI opportunities within Genea, he decided to start with the biggest and most pressing need – providing lab staff with analyses of the patient management system. The project involved Professional Advantage building a data warehouse using the Microsoft BI suite of tools, before overlaying QlikView to access and read data. "The main benefit of this approach was that we could provide access to a broader user base," Taylor says. "It allowed the labs to more easily generate data sets, to put data into Excel and conduct analyses in a more familiar environment."

The project soon improved the information available to lab staff. At the highest level QlikView is used to identify patient demographics. On an individual basis, when patients go into IVF treatment, the software enables staff to access cycle related information such as embryo quality scoring details, a scheduler that tracks the order of events, and even to view notes from any area of the organisation.

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Taylor says, "It was a very easy implementation. It all went very smoothly. The most time-consuming component of the project was developing the necessary queries for the data warehouse and this was an aspect completely unrelated to QlikView."

Taylor believes an important factor in the ensuing user enthusiasm for QlikView was the fact that the project was conducted quickly and relatively quietly. "We deliberately kept it quiet from internal users. The idea was to under promise and over deliver, so that popularity would grow organically and that's exactly what happened. Once we'd built the solution for the labs, as word of mouth spread, more people began to want access to the same capabilities," he says.

Development in less than a day

Over the next few months QlikView was used to develop a series of management dashboards that have now replaced the company's previous spreadsheet-based reports. The dashboards draw data from a variety of internal and external reports, including published Medicare reports, to provide company and competitive information. The finance team has also replaced its weekly and monthly spreadsheet reports with QlikView, using the software to view and compare budget, actual and forecast data, as well as key performance indicators relating to cash flow, debtors, trends and results.

Taylor is now working on a human resources dashboard and a procurement model that will be available to the finance team within the next month or two. "One bonus of QlikView is how quickly we can produce solutions. Two or three months ago the CIO came to me wanting a dashboard for the IT service desk. I was able to knock something up in less than a day and it's been running ever since. I didn't realise how good QlikView was for rapid deployment," Taylor admits.

Ultimately, Taylor anticipates that around 50 staff will become regular users of QlikView. "Previously the people using our patient management system had no ability to analyse system information. With QlikView, they can. It's not so much giving us information that we didn't have before, but it's giving non-technical users the ability to access the information more easily. After nearly six months of BI development in 2011, we formally ended the QlikView project in December 2011 but have taken the position that this will be an ongoing, evolving storage point of reports or solutions. It's become an operational, ongoing product for us now," Taylor concludes.

About Professional Advantage

Professional Advantage focuses on providing technology and services that enable high-performance workplaces and organisations. Professional Advantage was established in 1989 and today employs more than 230 people in Sydney, Melbourne, Brisbane, Perth, London and Fargo, USA. The company is the largest provider of leading brand global business management systems such as financial management, ERP, CRM, retail, business intelligence, business process management and portal solutions to mid-sized organisations in Australia, supporting over 800 clients nationally. Its multi-product offering is complemented by its development, systems integration, consulting, training, and support services. Professional Advantage is the winner of many business and vendor awards including the Microsoft President's Club 2011 and the 2012 Asia Pacific Partner of the Year Award for Infor.

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