Healthcare's Trusted IT Services Partner

Creating Financial, Operational, and Clinical Excellence since 1999
with ERP and EHR Advisory, Implementation, and Optimization Services

National Infor Alliance Partner | CloudSuite Specialized

Our Story

In 1999, ROI was founded by Kathy London and Scott Hein as a solution to healthcare executive complaints regarding ineffective project management of cross-departmental initiatives, such as best of breed system implementations, which often caused process gaps, inefficiencies, and budget overages.

ROI Was Built on a Foundation of Entrepreneurial Spirit and Culture

Years of experience at healthcare vendors and consultancies allowed ROI leaders to leverage a strong reputation and to establish a fresh culture, centered around people and quality results.

ROI was given its name to signify the value that our healthcare customers would realize as a result of working with us. That value showed up in a variety of ways. Some saw better system integration. Others were able to save costs in their time and effort to better support business operations. Others became more mature from a process perspective. Eighteen years later, ROI still means that our clients realize value in return for their financial investment, impacting processes, technology, and operational teams.

While our initial capabilities centered around project management in healthcare, ROI created an expanded set of equally mature offerings that would span the advisory, implementation, and optimization of ERP, EMR, and legacy systems.

Today, ROI continues to experience steady growth in new business and team members, high client satisfaction, and a reputation based on trust, industry expertise, technical acumen, and true partnership.

Healthcare Expertise

ROI believes that no other industry is as complex and unique as healthcare. Our people and offerings align with the lifecycle of healthcare technology: planning, implementation, optimization.

Business & Technology Acumen

Each ROI team member has 10+ years of Infor ERP and EHR expertise, as well as experience in financials, supply management, human capital, and clinical operations.

True Partners

ROI clients often share their appreciation for our collaboration, integrity, and commitment to partnership. Our clients' success is our success.

Entrepreneurs + Methodology + Culture = ROI

What We Do

Trusted Healthcare IT Services Firm

Creating Financial, Operational, and Clinical Excellence by planning, implementing, and optimizing ERP and EHR systems.

ROI maximizes technology value and return on financial, time, and people investments
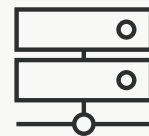
PROJECT MANAGEMENT

Driving healthcare IT & business initiatives to deliver quality outcomes, on time and budget.
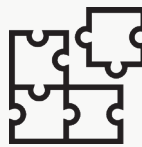
ADVISORY

Objective engagement with clients to plan for, review, or build a roadmap for future state processes and technology.

IMPLEMENTATIONS

System planning, implementations, upgrades, & migrations.

OPTIMIZATION

Modification of processes and technology for cost savings and efficiency gains.

SUPPORT

Functional and technical support.

STAFFING

Short & long term resource engagement to drive initiative success.

Infor ERP, BI Solutions CloudSuite Specialized

Healthcare EMR, EHR, Legacy Platforms

Our Clients

Once ROI completes an engagement for a customer, we are asked to return, again and again, for new projects, because of how thorough we are and how we empower our customers not to "need" us in the long haul. Our work quality is only as good as what we leave behind to stand on its own.

INFOR FINANCE & PAYROLL SERVICES

"ROI did a fantastic job of digging in deep to learn the new system and accepting the enormous, positive changes to their work streams. We appreciate you taking us on and getting us moving in the right direction, and helping get us set up for future growth."

DIRECTOR, CORPORATE APPLICATIONS

EDI ASSESSMENT & RECOMMENDATIONS

"We were very impressed with ROI's EDI resources and the tools developed to help us assess which areas of EDI needed the most attention. With training, we now have the procedures in place to maintain our EDI and optimize our invoice to payment processes."

EXEC. DIRECTOR, INFOR INTEGRATION & OPTIMIZATION

INFOR IMPLEMENTATION SERVICES

"ROI far exceeded the expectations we had set for them. We appreciated the way the ROI team worked collaboratively with our resources as well as Infor to get us to a successful go-live. We've worked with the ROI team in the past and definitely will do so again."

SVP, FINANCE AND BUSINESS SYSTEMS (HOSPICE CLIENT)

INFOR ASSESSMENT & ROADMAP

"Bravo! Very well executed assessment. Comprehensive but actionable."

CHIEF INFORMATION OFFICER (UNIVERSITY HEALTH SYSTEM)

What Makes ROI Different?

Our Infor professional services facilitate information-driven business processes that connect, automate and streamline backend business functions across finance, human resources, talent management, supply chain management, inventory management, business intelligence and integration. Our team has extensive experience in healthcare ERP, finance, supply chain management, EDI, human resources, talent management and business process optimization.
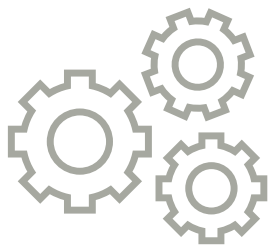
Comprehensive Methodologies

OUR PROCESS

All ROI Consultants follow our comprehensive methodologies that delineate clear roles & responsibilities with ROI and clients, high quality deliverables, and outcomes that align with client success criteria.
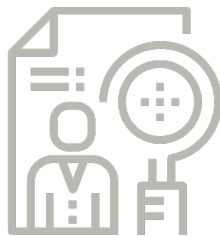
Industry, Functional, Technical Experience

OUR PEOPLE

All ROI Consultants have at least 10-15 years of experience in their functional and application specialty areas. This creates tremendous credibility with our clients.

Superior Reputation & Client Engagement

OUR RELATIONSHIPS

ROI clients are centered around respect, empathy, and trust. Our track record has been 100% on time, on budget delivery. Our clients gain greater self-sufficiency as a result of ROI involvement.

ROI's Infor Practice

infor
Alliance Partner
CloudSuite™ Specialized

ROI has a dedicated Infor ERP practice focused on planning, optimizing, and implementing the full suite of Infor Healthcare applications. ROI has earned specialization credentials for Infor CloudSuite™ and two micro-verticals – Hospital & Health Systems and Extended Care Providers.

Project Management

As the foundation of ROI's offerings, we provide project management with the delivery of every engagement. Our PMs utilize PMI principles and a unique blend of healthcare & Infor expertise to drive successful projects.

100% On-Schedule	100% On Budget	PMP Credentials

Advisory Services

ROI offers objective advisory services to our clients. While every engagement is unique, most of our consulting engagements span assessments, EDI health checks, technology planning, roadmap development, business process review, and M&A.

Assessments	Roadmaps	Planning

Implementations & Upgrades

As an Alliance Partner, ROI recognizes Infor as a superior technology that, when implemented correctly, offers tremendous value to organizations. ROI works with clients to plan, implement, & upgrade Infor, and transition to the cloud.

v9, 10 to 11 Upgrades	Implementations	CloudSuite Specialized

Support & Optimization

Once clients have implemented Infor, many require ongoing functional and technical support to maximize their return on investment. ROI provides support, systems administration, security operations, and process automation.

Process Automation	Integration	Ongoing Support

OPERATIONAL FINANCE

Financial management automation & optimization

Strategic integration with other business applications

Closing optimization

SUPPLY CHAIN EXCELLENCE

Optimized Procure-to-Pay

Strategic inventory management

Healthy EDI

HUMAN CAPITAL MGMT

Streamlined employee management

Optimized talent

Self-service automation

TECHNOLOGY AUTOMATION

Process Flow Automation

Tight Integration

Systems Administration & Security

Mature Business Intelligence

Infor Practice Leaders

ROI is a brand of pride, meaningful client relationships, culture, and a strong mission. Our organization is led by approachable Partners and Executives, powered by hardworking Consultants, and supported by mature operational infrastructure and methodologies. We are 100+ strong and continue to grow steadily, along with our clients' demand for our Infor ERP and EHR services.

100+ 👤👤👤👤👤👤👤👤👤👤👤	🎓 Credentialed Project Managers and Consultants	ROI	✓ Strict Hiring Practices Skillset and cultural alignment are critical

Jim Jancik
President, Managing Partner

- Oversees ROI strategy & execution
- 25+ years of healthcare IT experience
- Former Sr. Partner, Ernst & Young
- Led National Infor (Lawson) Practice

Bill Starks
Partner, Infor Services

- Leads ROI's Infor Services Practice
- 20+ years of Infor (Lawson) experience
- Former Ernst & Young Consultant, Supply Chain & Materials Management Leader

Kathy London
Founding Partner & CFO

- ROI Co-Founder, EVP, CFO
- 25+ years of healthcare IT & financial ops
- Extensive experience in project management, strategic planning, implementation
- Former McKesson, Siemens Leader

Jimmy Haddad
Vice President, Infor Services

- 20+ years of consulting, implementation, analytics experience
- Extensively trained in all Infor ERP solutions

Jenny Mattson
Director, Business Development

- 20+ years of healthcare experience
- Focused on relationship cultivation
- Former MHC Account Executive

> **"** ROI's mission is to build & grow a company where our team members enjoy working with each other, creating a superior level of service to maximize our clients' technology ROI.

Infor: Demand Trends

While ROI engages with hospitals, health systems, and other organizations to provide a variety of functional and technical services, it is critical to acknowledge the specific services with increased demand across our client base.

1

CloudSuite FSM, HCM v11 Implementations

JOURNEY TO CLOUDSUITE

Wherever clients are in their journey to Infor CloudSuite, we can engage and navigate them at the right pace and direction to meet their specific needs.

CloudSuite Specialized

Many hospitals and health systems are existing Infor customers that are looking to streamline, integrate, and simplify their back office systems with the latest functionality, technical platform, and infrastructure within Infor's CloudSuite solution. Some organizations are on version 9, while others are still getting adapted to version 10 capabilities. Others are weighing the pros and cons of on-premise vs. cloud solutions.

ROI has worked with many clients to assess current state processes and technology, weigh the options related to versions, hosting, and module sequences, and implement the best solution possible.

CLOUDSUITE FSM AND HCM V11 IMPLEMENTATION IN PROGRESS

2

Infor Assessments & Roadmaps

STRATEGIC & OBJECTIVE CONSULTING

ROI's assessments are more than just looking at the system setup. They are designed to be flexible but specific according to the needs of your organization.

Process & Technology Review

Clients want to gain efficiency, increase productivity, and access visibility through real-time analytics that will assist them in informed decision making and excellence across financial, operational, and clinical areas. Existing cultures, system limitations, lack of knowledge, and antiquated processes can sometimes hinder the realization of value. ROI has engaged with many clients to conduct single and multi-suite assessments of Infor technology and processes to develop a list of issues, opportunities, priorities, and recommendations to help them achieve success. An example of this is the development of a BI maturity model roadmap for clients who seek increased visibility and analytics.

CURRENT STATE REVIEW | STRATEGIC ROADMAP | FINDINGS & RECOMMENDATIONS

High demand areas from ROI's Infor clients

3

CONSOLIDATION OF INFOR TECHNOLOGY & PROCESS

Planning, design, implementation, integration, and support of Infor across facilities.

Process & Technology Consolidation

Merger & Acquisition Support

According to Health Systems Management, there were 102 hospital merger and purchase transactions announced in 2016, an increase of 55% since 2010. This significant upward shift in M&A activity creates a strong demand for process review and refinement, as well as consolidation of systems, infrastructure, teams, and operational activity. Not to mention the cultural impacts of these changes, while trying to provide high quality care to patients across facilities. ROI engages with clients by evaluating the timing, budgets, processes, and critical success factors to build a plan of adaptation and consolidation. Once plans are documented, ROI is able to provide services needed to create a seamless transition.

CONSOLIDATION OF PROCESS, CULTURE, AND TECHNOLOGY TO SUPPORT M&A

4

SUPPLY CHAIN EFFICIENCY

ROI uses output from key Infor EDI tables and a copy of your GPO report, to trigger the functionality of our custom tools. We produce detailed recommendations.

Process Automation

EDI Health Checks & Automation

Exchanging documents electronically improves transaction speed and visibility while decreasing the amount of money spent on manual processes. For all of its power, EDI is often underutilized.

1: EDI is prone to problems having downstream impact on Purchasing, Inventory, AP, etc.

2: EDI, when not operating correctly, can cause PO's to not get transmitted, invoices to not get interfaced, and it takes significant buyer's and accounts payable staff's time to reconcile.

3: EDI can be a major contributor to Received Not Invoiced (RN) problems as invoices can be transmitted by the vendor but not matched into the Infor Lawson system due to setup issues.

FREE EDI HEALTH CHECK | EDI SETUP TABLE ASSESSMENT | RECOMMENDATIONS

IMPLEMENTATION
ON PREMISE & CLOUDSUITE
End-to-end support of client implementation and upgrade efforts for Infor ERP and BI solutions.

ASSESSMENTS & ROADMAPS
OBJECTIVE CONSULTING
Strategic planning, assessment of processes and technology, and prioritized roadmaps.

M&A
PROCESS & TECHNOLOGY CONSOLIDATION
Multi-facility and entity engagement to plan for and adapt to the consolidation of systems, culture, and processes.

EDI AUTOMATION
SUPPLY CHAIN EFFICIENCIES
No-cost assessment of EDI tables to create a list of issues, business impacts, and prioritized recommendations.

Case Study

A major IDN, with 199 hospitals in 29 states and 135,000 employees. ERP was a component of their strategy for building an organization prepared to perform as a consumer driven healthcare organization.

Client wanted to standardize IT platforms to lower costs & increase efficiency

As a part of a larger effort to create a shared services model within IT, this health system wanted to:

- Build out infrastructure to support performance improvement and cost controls.

- Improved efficiencies and lower costs.

- Clean-up financial system infrastructure for visibility & reporting.

- Improve clinical integration & collaboration.

- Achieve synergies in operations, following the HMA acquisition.

- Support the divestiture of sites in various geographic markets.

Project Outcomes

Shared Services enabling performance improvements in:

- Financial Reporting

- Procurement

- Inventory & Replenishment across Distributors & GPOs

- Designed & implemented 5 innovative automations to support Supply Chain scalability

- Consolidated from 9 CoA into 1

- Set up over 1,000 companies to support financial operations

- Instituted controls to reduce invoice coding errors

- Implemented analytics to support key KPIs; Days Payables Outstanding, Total Days to Pay, Average Days to Term, Average APIA Processing Time

Longstanding partnership, built on quality, trust, and quantifiable results.

Project specification

1	Provided Infor SME services, as a part of operational shared services.
2	Implemented General Ledger, Requisition, Purchasing, Inventory Control, AP.
3	Provided team that included Project Manager, FSM Consultants, EDI Consultant.
4	Conducted detailed design workshops, built taxonomies and extensive designs.
5	Created extensive process flow design.
6	Completed collaborative implementation engagement over 20 months.

Case Study

The nation's 13th largest non-profit health system with 17 hospitals, 16 Community Network Hospitals, 15 at Home locations, 4 Accredited Colleges, 30,000+ employees, and 9 regions.

Project Outcomes

- Fixed more than 5,000 missing ED40 records

- Provided an immediate correction to over $7M in pending EDI invoices

- Prepared system for Low Unit of Measure implementation.

- Completed training

- Volume of automated transactions went from 32.27% to 83.60% after the cleanup effort was complete

Targeted solution to data issues that created self-sufficiency and process optimization within the client.

Client experienced purchasing, inventory, and API challenges due to EDI issues

After a recent implementation of Infor ERP, this client experienced:

- Data issues that caused downstream gaps across purchasing, inventory and AP.

- 46% of ED40 records required for invoicing were missing.

- Over 50% of Ship To accounts needed registering with GHX.

- $1.4M per month of orders were failing EDI.

Project specification

1	Cleansing of Infor EDI data to remove duplicates and ambiguous records.
2	Completed repairs to ED10 records.
3	Registered missing Ship To and Vendor ED40 records.
4	Developed and delivered EDI training classes to key resources.
5	Completed EDI health check and remediation within five weeks.
6	Empowered client to maintain EDI and optimize invoice to payment processes.

ROI

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