

Regaining Operational Control and Lifecycle Visibility via CX Transformation

Industry: Behavioral & Developmental Health | **Scale:** 70+ Franchise Centers | **Platform:** Creatio CRM & Prosperity EHR

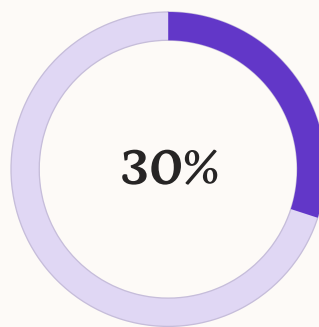
Executive Summary

A nationwide provider of programs for children and teens with developmental challenges faced a critical operational bottleneck as it expanded to nearly 90 centers. Operating on disconnected legacy tools, the organization struggled with fragmented data and limited visibility into the patient journey. B-TRNSFRMD architected a comprehensive CX transformation to standardize lead management and support a pivotal shift in their business model: transitioning from a private-pay-only service to an insurance-eligible clinical model.

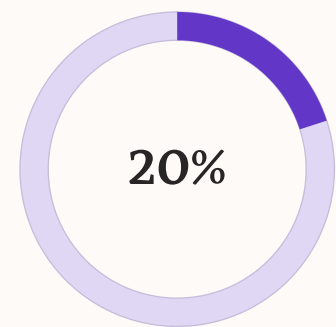
Key Highlights



Implementation Time



TCO Reduction



Revenue Impact — Boost in Enrollments

The Challenge: Legacy Technical Debt & Model Complexity

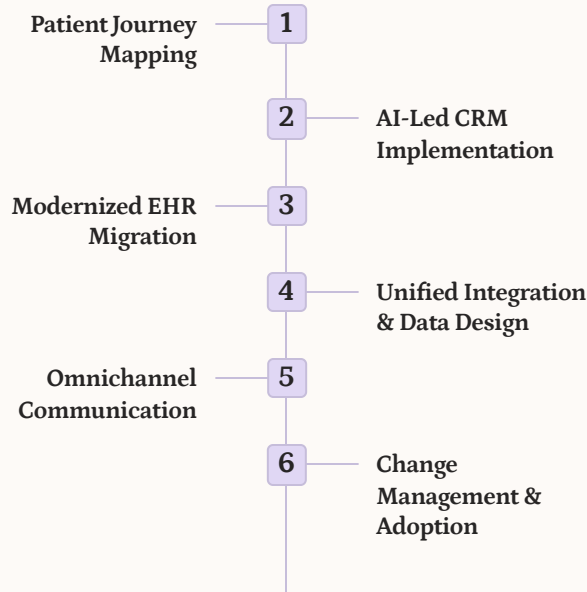
The client's rapid expansion created an urgent need for standardized operations. This need was compounded by a legacy technology stack that was no longer agile or cost-effective for their unique business model.

Inconsistent Center Processes Because HQ tools were unintuitive, centers relied on spreadsheets and local tools, creating massive reporting blind spots.	Broken Intake & Inquiry Without centralized oversight, inquiries were not acted on consistently, leading to lost opportunities.	Platform Misalignment The organization was previously using Salesforce as a clinical EHR and HubSpot for CRM, neither of which were built for their specific behavioral health workflows.
Functional Limitations These platforms were heavily over-customized with untraceable Apex code, making the environment fragile and difficult to maintain.	High Total Cost of Ownership (TCO) Maintaining two separate, Enterprise-level systems created a rigid, expensive infrastructure that lacked the agility needed for growth.	

Future State & Realized Impact

Strategic Transformation Approach

B-TRNSFRMD utilized a structured methodology to move the client from rigid, high-cost legacy systems to a modern, integrated clinical ecosystem.



The Solution: A Unified Clinical & Operational Experience

The transition to a unified, flexible platform was essential to support the client's vision of a connected community.



Standardized Center Operations

Unified processes across 70+ centers ensure consistent handling for both insurance and private-pay patients.



Consolidated Patient Records

The integration between Creatio and Prosperity provides leadership with a 360-degree view of every family from inquiry to program completion.



Workflow Automation

Replaced layers of manual code and spreadsheets with automated processes to handle the complexities of insurance eligibility.



Reliable Reporting

Delivered real-time reporting to support network-wide performance insights and data-driven decision-making.

Realized Benefits

With the implementation of Creatio CRM, the business realized measurable benefits aligned with industry benchmarks, reflecting a high-impact transformation:

TCO Optimization

Consolidating from an expensive Salesforce/HubSpot stack to a single low-code CRM integrated with a specialized EHR reduced technology overhead by **20–30%**.

Increased Agility

Moving from fragile Apex code to an industry-specific EHR and low-code CRM allowed for system updates in **days rather than months**.

Operational Control

The shift has eliminated "local workarounds", ensuring families receive a **consistent family experience nationwide**.

Boost in Adoption Rate

Switching to intuitive environments like Creatio resulted in a **40% increase in user engagement & adoption rate**.

Conversion Impact

By leveraging data to personalize engagement, the team saw a **20–25% improvement in patient conversion rates**.

This end-to-end transformation journey illustrates how B-TRNSFRMD guided the organization from a fragmented, high-cost legacy environment to a unified, agile clinical ecosystem — delivering measurable operational control and lifecycle visibility across 70+ franchise centers.

Contact Us:

At B-TRNSFRMD, we revolutionize customer experiences and service delivery by rapidly implementing innovative digital transformation strategies for global enterprises, leveraging our expertise in AI, No-Code, and Automation solutions. We are solutions partners with Creatio, Microsoft, Freshworks, Atomicwork, NICE, Genesys, and Five9.

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