

## REVELWOOD SUCCESS STORY



# LEARN Behavioral Modernizes FP&A with Workday Adaptive Planning

### OVERVIEW

Industry: Healthcare / Multisite Applied Behavioral Analysis Therapy

### CUSTOMER PROFILE

LEARN Behavioral

### CHALLENGE

Change and modernize a manual and time-consuming budgeting and forecasting process

### SOLUTION

Workday Adaptive Planning

### BENEFITS

- Reduction of hours spent building budgets and forecasts by site
- Complex reporting and analysis for strategic decision-making
- Granular reporting for reimbursement rates, non-billable hours, daily sales outstanding and more

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Finance Manager  
LEARN Behavioral

LEARN Behavioral, headquartered in Baltimore, Maryland, has been helping families with autism or other special needs thrive for over 20 years. The organization specializes in the use of tailored treatment programs based on contemporary, family-focused applied behavior analysis (ABA) therapy as well as clinical insights and best practices. LEARN Behavioral has a network of 5,000+ behavior analysts and clinicians and operates centers in 18 states across the U.S. The organization provides services at its centers, in homes and directly to school districts.

Like many multisite healthcare organizations, LEARN Behavioral was using a manual, spreadsheet-based process for budgeting across its 100+ centers. The organization was budgeting at the site level, providing each site with its own Excel template. The sites would use the template to build the budget yearly. It was very manual and very time-consuming.

“Our budgeting process would take approximately three months,” said Brian Fike, finance manager, LEARN Behavioral. “The process included meeting with the leadership team, making adjustments and building out all the assumptions.”

### Growth Requires Change

“We’re a rapidly growing business,” stated James Drury, director of finance, LEARN Behavioral. “After a recent purchase by a private equity firm, we realized we’d either have to hire a lot more people in finance or find a way to enable us to be more efficient and more effective. The scale of the business was getting too hard to manage with our small team. We knew we needed a budgeting and forecasting system.”

After analyzing several FP&A solutions on the market, LEARN Behavioral selected Workday Adaptive Planning and Revelwood as its implementation partner.

### Integrating Multiple Data Sources

LEARN Behavioral wanted a full picture of its financials. This meant integrating Workday Adaptive Planning with various data sources including Great Plains for financials, UKG Pro for payroll and CentralReach for accounts receivable subledger billing. CentralReach is specialty software for autism and IDD (Intellectual and Developmental Disabilities) care providers. The first thing the team tackled was integrating these sources.

The Workday Adaptive Planning solution links all the data systems together. The organization’s actual billings and charges data, payroll and financial data are all integrated. This was impossible to do with the previous manual system.

LEARN Behavioral will gain significant insights by using Workday Adaptive Planning to triangulate this information. For example, the Finance team wants to understand Daily Sales Outstanding (DSO) by payer by using data in CentralReach. With Workday Adaptive Planning, LEARN Behavioral can analyze and create reports on daily sales trends, which they will use with the billing team. Together the teams can identify payers that are falling behind and further analyze the claims to better understand why they have not been able to collect on them as quickly as they have in the past. Insights like these will better inform operations and what management needs to focus on.

### A Comprehensive Approach to FP&A

Like many multisite healthcare organizations, LEARN Behavioral has complex workforce planning and expense needs. Revelwood built a model to examine how much mileage and other non-billable time employees log. The finance team and operations teams can then make strategic decisions on this data – for example, if an employee is driving a great distance, then perhaps they should redeploy them to a closer location.

## About Revelwood

Revelwood helps finance organizations close, consolidate, plan, monitor and analyze business performance. As experts in solutions for the Office of Finance, we partner with best-in-breed software companies by applying best practices guidance and our pre-configured applications to help businesses achieve their full potential.



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Brian Fike  
Finance Manager  
LEARN Behavioral

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“Previously, this would involve pulling data from UKG Pro manually,” said Fike. “It would be an hours-long process to get all that data. Now with Workday Adaptive Planning, we can just run a report with conditional formatting to identify any employee who has more than 250 hours of non-billable time in one payroll period. Information such as this leads to larger conversations about the best use of our workforce.”

The new solution helps LEARN Behavioral take a bigger look at staffing and operations. It can easily make updates, such as adding in expected promotions and departures, and see what impact those actions will have. “The ability to easily model expected activities is a game-changer for us,” said Drury.

## Creating Fans of Workday Adaptive Planning

“We’ve started rolling out the Workday Adaptive Planning system to our clinical leadership – the operational leaders out in the field,” stated Drury. “We have monthly calls with them to provide updates on their financials. We talk through forecast updates, modeling updates and more. The team has been very receptive to the Workday Adaptive Planning solution. We’ve received a lot of positive feedback.”

The implementation was on-time and on-budget. “We had fun with our Revelwood implementation team,” said Fike. “We had a great project manager who drove the team. Our weekly calls provided us with quick updates without wasting our time. The team really let us know where things stood with this project. It felt like the team was really focused on us.”

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## Early Results and Next Steps

LEARN Behavioral is already seeing results. The finance and clinical teams have monthly financial calls. With Workday Adaptive Planning, they can analyze data to determine whether a location has met its monthly goals and if not, why it hasn’t met those goals.

“It is a challenge to analyze reimbursement rates,” said Drury. “With Workday Adaptive Planning, we can look at reimbursement rates by payer, by procedure code and all the way down the list of how you can slice a reimbursement rate for a specific payer.”

One of LEARN Behavioral’s next steps with its Workday Adaptive Planning solution is to build out KPIs for human resources (HR). Like all healthcare organizations, LEARN Behavioral is faced with a high turnover personnel environment. They plan to have different KPI views on cost per hire, time to profitability with hourly providers and more. “We’re confident and comfortable that we can create them – as we did with the payer DSOs – and then get to a detailed view of data by payer, by payer level, client by provider level and more,” commented Fike.

“Just the other day I created a very specific report,” added Drury. “In the past, it would take us two months to build this report. With Workday Adaptive Planning, I was able to get it done in two hours.”