

# Meerkat Health – Case Study

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## Commentary from the Client:

Alex Lee, VP Strategy at Meerkat Health

Very excited to be working with you on this. We've been using a mix of powerpoint and excel to manage tracking for the last year, and we'll be very happy to start actually saving some time on tracking these updates monthly in the Cascade tool.

To recap before you get started, **Meerkat Health** is a medium-sized regional (for profit) health network in the Tri-State NY area, comprised of three regions that each manages a series of hospital and clinics (New York, Connecticut, and New Jersey). We generally think about our facilities that support our patient network as the **Delivery** part of our org, while other departments such as **Finance, Marketing, and HR** sit within our **Shared Services** arm.

Our general philosophy to driving strategy is based on three **Strategic Themes** – Growing the Network, Quality Care, and Operational Efficiency. Each contains a few **Core Objectives** that sit at the corporate plan level, and cascades down into **Initiatives** that sit within each of the Delivery and Shared Services plans. Each initiative will have a mix of success criteria, either **Success Measures (Quantitative)** or **Action Items (Qualitative)** dependent on the specific initiative. Corporate objectives may sometimes have their own overall success criteria, but only in a few situations.

Our historical approach has been to meet with each of the different teams on a **monthly basis** to review progress and updates on their initiatives, which means a few days after the end of each month someone on each team will go in, update the progress of their items and write a few summary sentences at the Initiative level. The executive team then meets **quarterly**, only looking at reports on the Corporate Plan to determine how we're doing overall.

Here are some additional details that might be useful for you, if it wasn't clear enough in the document:

- In 2025, we will only be using a certain set of **time horizons**: FY 2025, Q1 2025, Q2 2025, Q3 2025, Q4 2025, H1 2025 and H2 2025.
- When people **write updates** to their initiatives, I'd like to have them provide me two different sets of information and they should both be required. (1) Success and Progress Made (2) Blockers and Risks
- The only **custom field** I need is a "Priority" data element, where I can set the priority of initiatives as either High, Medium or Low. Alternatively, I'm open to using the "tag" feature you mentioned to me before, so perhaps you could show me both.

*I'm hoping this data you requested ([Sample Data - Meerkat Health](#)) will be everything you need to build out our new Workspace. Don't hesitate to reach out if you need anything clarified*

## Case Study Scope (Expected Time – 90 to 120 Minutes):

**1. Build the Plan Hierarchy for Meerkat Health (i.e. create the necessary plans, and set the parent/child relationship to look like the described organization) – Insights → Plan Alignment**

**2. Go into the Admin section of the Workspace and configure the following based on the guidance above:**

- a. Strategy Model
- b. Time Horizons
- c. Custom Fields
- d. Updates

**3. Design each plan as specified in the source excel file, along with Objectives, Success Criteria, Dates, Owners, Collaborators, and any other customization**

a. For each Success Criteria, put in a range of potential values (some on track, some at risk, some behind)

**4. Create two reports for review by the client:**

a. Monthly Overview – intended to go through the progress on initiatives and success criteria within each team. Create views in this by focus area, team, and owner and determine the appropriate fields to include that would lead to a fruitful discussion

b. Quarterly Executive Overview – This is meant for the senior leaders and should be more focused on high level insights, leveraging things like the objective summary, AI summary, etc. In this case, it's usually better to be more selective of which KPIs to show and how to show them, and remove anything that would not be appropriate for C-level to be seeing on a regular basis

**5. Create a 5-10 minute demo video highlighting the key functionality of the Cascade platform to the client, being sure to highlight:**

- a. The initial plans built and their alignment to the original request (3-4 min)
- b. The layout of the reports and what they will help the Working Team and Executive Team to review (3-4 min)
- c. How a user would come into the platform and submit an update on a monthly basis (1-2 min)

## Evaluation Criteria:

Success with this case study will be driven by how well you can translate the requirements above into a working Cascade Workspace. Expectations are that you have either done self-training or received sufficient training from the Cascade Support team in order to accomplish all of the activities above in order to be considered a **Certified Cascade Partner**.

We don't expect every case study to be perfect, but the purpose of this assignment is to make sure you're familiar with all of these major capabilities of the Cascade platform so that you will be able to deliver the highest quality support to your clients. If we feel that the comprehension of these capabilities of the tool is not at a level that best represents Cascade, we may ask you to revise parts of the assignment.

As with any of the client work we do, this may require making assumptions about how to best interpret a client's needs and learning the breadth of functionality in the tool in order to deliver on it in the best possible way, which we hope you'll have the chance to explore and be able to showcase. If you need any assistance, feel free to reach out at [partner.support@cascade.app](mailto:partner.support@cascade.app) and we'll find time to provide any guidance throughout the process.