

Individual & Family Services | Life Unlimited, Inc.

# Mission-Driven Nonprofit Transforms Care Operations with DCG's SPEAR Framework



## About Company

Life Unlimited, Inc. is a non-profit organization headquartered in Kansas City, MO, dedicated to supporting individuals with developmental disabilities. With a team deeply committed to fostering inclusion, dignity, and independence, Life Unlimited delivers vital services across the community. As operational demands grew, the organization required a modern digital backbone to sustain its mission, and that's where DCG stepped in. DCG brought in the right technology at the right time.

## Business Overview

Despite its powerful mission, Life Unlimited's internal systems were fragmented, manual, and vulnerable to compliance risks. Communications were decentralized, project tracking lacked structure, and critical operational data was split across outdated infrastructure. As a non-profit, Life Unlimited sought to modernize systems, improve compliance, and better serve those relying on its care - without disrupting ongoing services.

## Challenges

Life Unlimited faced systemic challenges that hindered visibility, efficiency, and security:

- **Communication Complexity:** Multiple communication channels created inefficiencies and occasional gaps in visibility, underscoring the need for a centralized and secure
- **Lack of Standardized Tools:** Project tracking, approvals, and document management were handled in Excel and OneNote. This provided little visibility or accountability.
- **Infrastructure Vulnerabilities:** Manual device setups, outdated servers, and scattered data created downtime risks and hindered scalability.
- **Compliance Exposure:** Without HIPAA-compliant AI tools or robust data monitoring, the organization faced regulatory and security vulnerabilities.
- **Disconnected ERP and Financial Systems:** Financial operations relied on disconnected platforms like Sage and Excel, resulting in duplication and delayed insights.
- **Inefficient Field and Intake Operations:** Manual mileage tracking, fragmented participant intake, and lack of CRM capabilities slowed responsiveness and growth.



## Technology & Approach


## How DCG Powered Recovery

DCG partnered with Life Unlimited to stabilize operations, centralize collaboration, and strengthen compliance controls without interrupting critical care services. By sequencing initiatives through our proven framework, the organization gained clarity on what to fix first, what to phase later, and how to fund transformation responsibly.

### Critical Implementation Milestones

- Planned secure, centralized communication via Teams to simplify collaboration.
- Outlined standardized project and intake workflows leveraging SharePoint and CRM tooling.
- Recommended Power BI dashboards for live tracking of service use, waiver approvals, and KPIs.
- Defined a modern ERP roadmap with phased integration milestones for long-term scalability.
- Enabled conditional access and threat detection across all users and devices.

### Strategic Wins

- **Planned Intake & CRM Alignment:** Roadmap to streamline referral, waiver, and fundraising tracking to improve transparency and reduce manual work
- **Data Centralization & Reporting:** Currently building the foundation for live visibility into service delivery, financial health, and operational KPIs.
- **Secure AI Readiness:** Opportunities for compliance automation and AI workflows have been identified to implement robust systems in the future.
- **Executive-to-Operator Alignment:** Created a roadmap where frontline teams and leadership co-owned the path forward, reducing friction and boosting morale.

## DCG's SPEAR-Led Approach

DCG deployed its proprietary SPEAR Framework to unify systems, modernize operations, and reduce compliance risk. Through a multi-phase roadmap rooted in collaboration and transparency, DCG addressed root inefficiencies while keeping Life Unlimited's mission at the center.



## Key Benefits

<b>Operational Clarity</b> Fragmented communication tools replaced by a centralized, secure Microsoft ecosystem.	<b>Compliance Confidence</b> HIPAA readiness built into every step, protecting staff and clients alike.	<b>Efficiency Gains</b> Faster participant intake, smarter project tracking, and more responsive field operations.	<b>Scalable Infrastructure</b> Legacy systems replaced with cloud-ready, modular solutions designed to grow with the mission.	<b>Cultural Momentum</b> Staff now see transformation as empowering and not overwhelming.
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