

How BatonCare Unified Healthcare Operations in Salesforce

Powered by Cloud Maven, Inc SMS & Fax Hub and Medical Insurance Verification

One
Platform

Unified Operations

Core workflows managed within Salesforce

Zero
Switching

Between Applications

Routine tasks completed without platform hopping

5 Stars

Customer Rating

BatonCare's rating of Cloud Maven, Inc

CLIENT & PROCESS CONTEXT

BatonCare is a healthcare provider that handles many daily aspects of patient care services including documentation and coordination among providers and insurance coverage verification. Similar to many healthcare organizations, BatonCare's productivity relies heavily on speed, accuracy, and management.

As the organization expanded, BatonCare adopted Salesforce as its primary system for workflow management. However, many of the core tasks still existed outside of the CRM. As such, the team was required to continually switch between applications to accomplish even the simplest of tasks such as faxing, communication, verification etc. This created an unnecessary level of friction for everyday work.

THE BUSINESS CHALLENGE

While BatonCare's processes were not broken prior to working with us, they certainly were not as streamlined as they could have been. Since much of the patient and provider engagement was happening outside of Salesforce, this created gaps in the end-to-end workflow and impacted downstream systems and processes.

Too much application switching, especially when faxing, verifying insurance coverage and communicating, occurred over time, thereby slowing down the team. Key challenges include:

- Frequent application switching for faxing, SMS, and eligibility verification.
- Slower turnaround times for insurance eligibility checks.
- Manual effort to send or receive medical documents with external facilities.
- Workflows felt disconnected rather than centralized.
- Operational inefficiencies lowered team productivity.

WHY CHANGE WAS NEEDED

- 1 Disconnected Workflows**
Critical tasks happened across multiple systems
- 2 Too Much Switching**
Teams constantly moved between different systems
- 3 Slow Eligibility Checks**
Insurance verification required unnecessary extra steps
- 4 Manual Document Exchange**
Medical records required significant manual handling
- 5 Limited Operational Visibility**
Disconnected activities made reporting more difficult

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THE CLOUD MAVEN, INC SOLUTION

BatonCare decided to bring everything into one place using Cloud Maven, Inc's solutions, SMS & Fax Hub and Medical Insurance Verification, all within Salesforce.

Instead of changing how their team works, the solutions integrated easily with their current workflows.

CORE CAPABILITIES

- **Salesforce-Based Fax & SMS:** Send and receive communications directly within Salesforce.
- **Insurance Eligibility Verification:** Verify patient insurance coverage faster and more efficiently.
- **Centralized Healthcare Workflows:** Manage all communication, verification, and documentation in one place.
- **Medical Document Exchange:** Send, receive, and manage medical records more easily.
- **Unified Patient Activity View:** Keep patient, provider, and operational activities connected.
- **Patient Self-Service:** Enable patients to update insurance and complete routine tasks independently.

IMPLEMENTATION APPROACH

The implementation was quick and relatively seamless. The Cloud Maven, Inc team remained available to BatonCare at all times to answer any questions, assist with configuration, and ensure the functionality met the business needs.

Testing went smoothly, and any necessary modifications were addressed in the very beginning stages of implementation, therefore going live with confidence.

"They gave us a very good price compared to other companies. The tools have been working exactly as advertised, and we are very happy with both the products and the team at Cloud Maven, Inc. Five stars."

- Daniel Kandler, BatonCare

BUSINESS RESULTS

BatonCare transformed previously disconnected healthcare workflows into a centralized Salesforce experience, making everyday operations faster, simpler, and easier for the team to manage.

1 Platform

for centralized healthcare operations

No System Switching

for routine operational workflows



5-Star rating from BatonCare

- Faster insurance eligibility checks reduced administrative delays.
- Accurate insurance information helped reduce potential billing errors.
- Medical records became easier to send, receive, and manage.
- Centralized activity improved reporting and operational visibility.

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