PerfectServe

A layered approach to medical scheduling and communication

balboa NEPHROLOGY

FEATURING

Marsi Friend
Senior Healthcare Analyst, Balboa Nephrology

Executive summary

Balboa Nephrology, one of the largest kidney care practices in Southern California, was struggling with fragmented, unpredictable, and time-consuming scheduling processes.

ORGANIZATION
Balboa Nephrology

LOCATION
Southern California

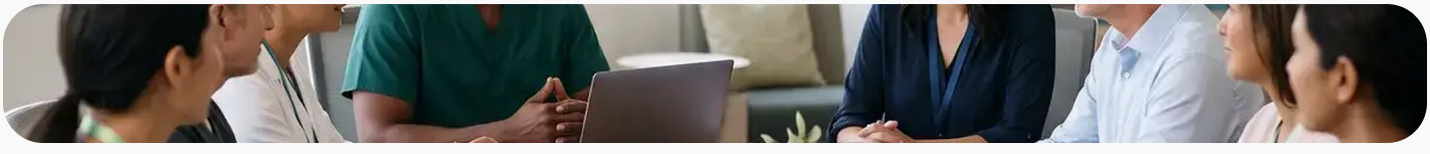
IMPLEMENTED SOLUTIONS
Lightning Bolt Clinical Team Scheduling & Medical Answering Service

> The results prove that when scheduling and communication work together, everybody wins.

- A failed rollout with another vendor underscored the need for a solution that could handle their complex schedules while also improving communication.
- By adopting Lightning Bolt Clinical Team Scheduling and integrating it with the already implemented PerfectServe communication platform, Balboa gained accurate, equitable schedules published six months in advance, streamlined call routing, and saw measurable improvements in provider and patient satisfaction.

A trusted source for kidney health

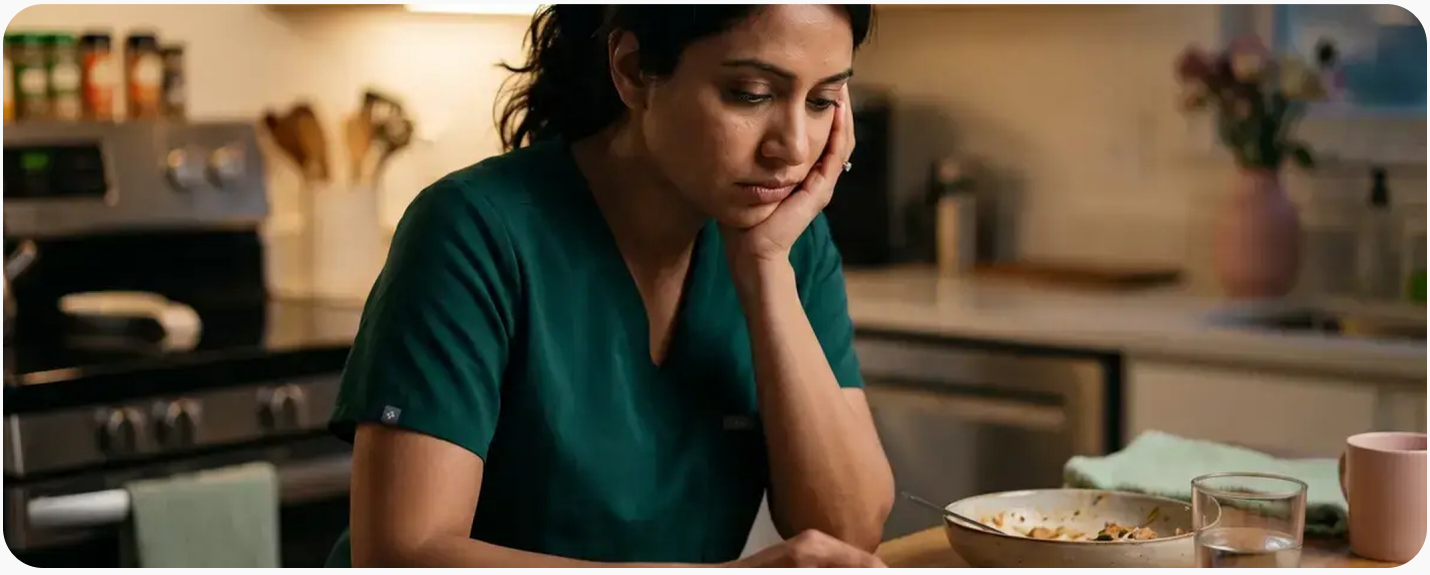
Balboa Nephrology was founded over 50 years ago, with 2 physicians serving as the foundation of the practice. Today, they've grown into a comprehensive group that manages over 20,000 patients across 18 clinical offices and 88 dialysis clinics in San Diego, Orange, and Imperial Counties. Their self-professed mission is to improve kidney health in an environment built on compassion, empathy, and trust.



The cost of manual scheduling in nephrology

Imagine you oversee clinical operations for this bustling group. You have dedicated, highly skilled providers and thousands of patients who depend on their compassionate care. Effectively managing so many moving parts takes a lot of work. But behind the scenes, provider scheduling has become a sticking point:

- Schedules have to be built by hand, a process that eats up hours of valuable time.
- The medium for building and maintaining schedules is not standardized. Some teams use Google Calendar, some use Outlook, and others use written calendars that aren't visible to everybody else.
- The whole process is disjointed and doesn't inspire much confidence.
- In some instances, the providers themselves play a hand in building schedules, taking time they really don't have to begin with. For some, the only "open" time to focus on schedules is in the middle of the night, a textbook example of pajama time.
- Schedule length is unpredictable. Some schedules cover a month, while others only cover the week, or even the day, ahead.



When a promising vendor falls short

Convinced that a purpose-built scheduling system is the answer, you seek help from a well-known workforce management vendor. Your hopes are high.

But as you dig deeper with this vendor, you quickly run into problems. The system can't handle the complexity of your group's schedules, and the customer service is decidedly lacking. You lose confidence and pull the plug. The rollout fizzles before it ever gets off the ground.

Your group is growing, the scheduling headaches are only getting worse, and the solution you hoped for has failed. Where do you go next?

Finding the right partner

That's the exact situation Balboa Nephrology found themselves in, and as it turned out, the answer to their problems was hidden in plain sight.

They had previously implemented PerfectServe's Clinical Collaboration, which helped them ditch pagers and streamline communication across the group.

When word came down that PerfectServe also offers an advanced provider scheduling tool, their positive experience convinced them to give it a shot.

And so began Balboa Nephrology's Lightning Bolt success story.

A medical scheduling system that finally works

After doing a pilot at 1 location with 11 users, they quickly scaled Lightning Bolt to 65 users across 11 outpatient locations. Both the product and the people who support it delivered the kind of tangible, immediate value that Balboa was looking for, and with a bonus tie-in to their already implemented communication platform.

At a glance

6,112
Total interactions handled across all covered locations

4:54
Median read time for urgent calls

6:20
Median callback time for urgent calls

Source: Balboa Nephrology, a recent three-month period across all covered locations. The source document publishes no sample size beyond the interaction count.

RESULTS

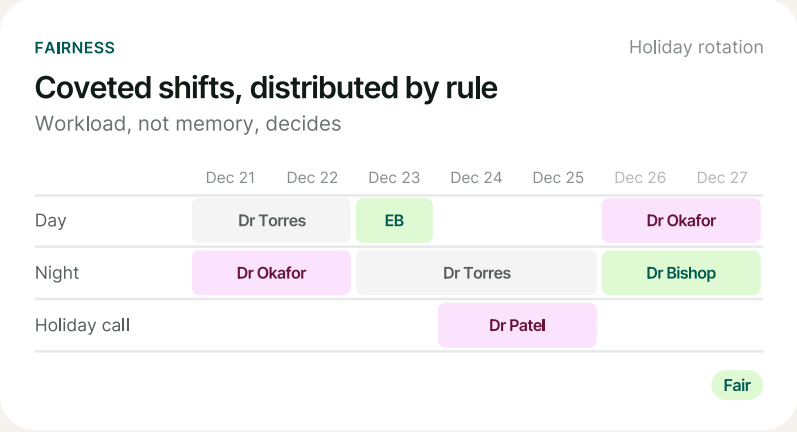
Why layering changed everything (and saved time)

Putting a nephrology schedule together means balancing equally critical duties like 24/7 call, dialysis rotations, and clinic visits.

When you try to put these details together all at once, it can lead to gaps and oversights. Lightning Bolt's layering feature, one of the biggest game-changers for Balboa, allowed these duty types to be scheduled in logical steps, verifying accuracy and fairness for each type before moving on to the next.

The previous vendor's platform completely lacked this functionality. With Lightning Bolt, this structure has helped to:

1. Eliminate conflicts from overlapping duty type requirements
2. Ensure dialysis coverage
3. Balance work effectively across the group
4. Generate optimized, accurate schedules in just a few hours, versus an unsophisticated, mistake-prone manual process that took "hours and hours"



RESULTS

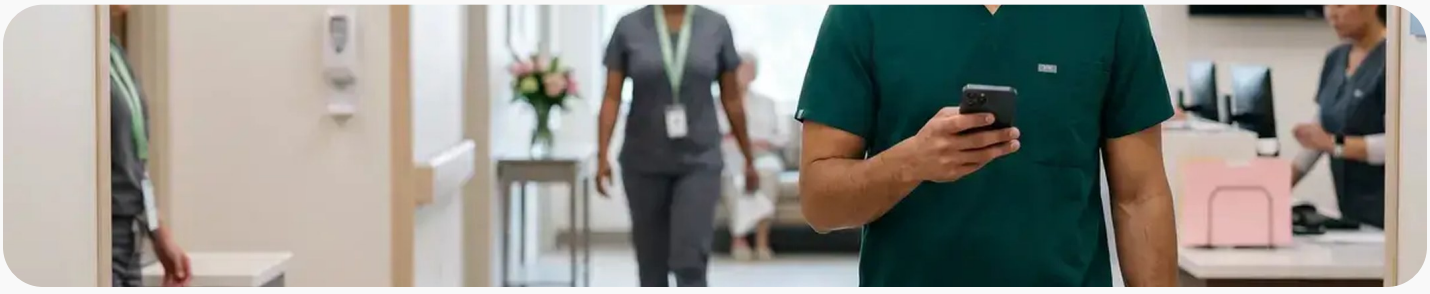
Predictability that benefits providers and patients

With Balboa's old scheduling process, schedule length was never standardized. Depending on the circumstances, a published schedule might have covered the next month, the next week, or even just the next day.

Scheduling is about much more than allotted shifts. When providers don't have certainty about their schedules, their job satisfaction can crater because their ability to plan the things outside of work becomes far too difficult. Have a vacation planned next month? Maybe a recurring family obligation every other Thursday? It's hard to make those things happen when the schedule can't keep up.

With Lightning Bolt, Balboa started publishing quarterly schedules six months in advance. This benefits patients and providers alike.

- Providers can now take time off with confidence, both thanks to extra visibility and a streamlined process for requesting time off. Previously, these requests were largely handled by managers and required a lot of guesswork, which could, you guessed it, lead to mistakes. Now, providers still submit requests to managers, but the requests go directly into Lightning Bolt, which makes them easier to fold into the schedule and much more visible to other team members.
- Because schedules are built out further ahead of time, patients can now book appointments much earlier. That's extra peace of mind for patients and a boon for continuity of care.



RESULTS

Scheduling and communication should always go together

Before PerfectServe, Balboa relied on a live answering service that required managers to manually re-enter schedule updates. Every change meant more keystrokes, more opportunities for error, and more time before an urgent call reached the right person.

Today, Lightning Bolt's tight integration with PerfectServe eliminates that friction. Any change made in Lightning Bolt is instantly reflected in PerfectServe's medical answering service, so the directory used to route calls is always current. This means no more double entry or mismatched schedules, fewer errors and missed handoffs, and peace of mind knowing that urgent calls are always routed to the right provider.

Over a recent three-month period across all covered locations, the results speak for themselves.

- ✓ 6,112 total interactions were handled.
- ✓ For urgent calls, the median read time was just 4 minutes and 54 seconds, with a median callback time of 6 minutes and 20 seconds. Callbacks lasted under 2 minutes on average.
- ✓ Only 10% were urgent, and urgent messages move fast.
- ✓ Nearly 1,000 callbacks and more than 2,100 voicemails were processed without a single manual schedule update.

Source: Balboa Nephrology, a recent three-month period across all covered locations. The source document publishes no sample size beyond the interaction count.

This integration underscores why good communication needs good scheduling, and it hints at a PerfectServe mantra: Build solutions that are better together.

RESULTS

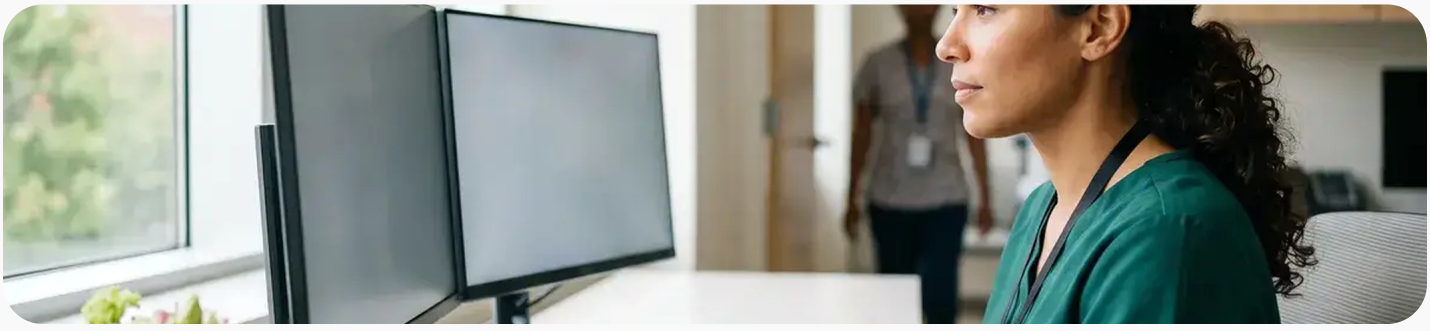
Making nephrology schedules more efficient with data analysis

With an automated scheduling solution like Lightning Bolt, generating schedules is only half the fun. Balboa takes things a step further with some trick data analysis.

Lightning Bolt provides the foundation with the schedule, and the Balboa team takes this data, exports it to Excel, and uses Python to dig deeper. Lightning Bolt does some of the analysis, but Python helps them generate a single report that confirms they have:

- Covered dialysis rounds
- Highlighted any “free time” half days on provider schedules
- Checked overbooked and underbooked providers
- Summarized their total call and clinic days

> One of the main goals of this project was to make schedules more efficient, and using a more granular data analysis method to highlight areas for improvement has been especially helpful.



RESULTS

Unique and proactive customer service

On the heels of a failed rollout of another promising piece of scheduling software, the team at Balboa was understandably a little anxious about similar shortcomings popping up during the Lightning Bolt implementation.

> They were glad to find these worries were unfounded.

The Lightning Bolt team at PerfectServe has a reputation for top-notch customer support, and Senior Healthcare Analyst Marsi Friend saw this come to life in her repeated interactions with a particular Technical Support Specialist. This dynamic is a large part of the project's success, and it's because the Lightning Bolt team knows that respect and trust are earned through helpful and attentive service.

Better scheduling, stronger communication, lasting impact

This story highlights what a lot of healthcare organizations face when they're trying to improve their daily operations with technology. Many important processes are still done in a painstakingly manual fashion, and that causes negative ripple effects for everybody: providers, administrative staff, and patients.

But buying technology is not a surefire fix for these problems. Some vendors embellish their ROI, while others underinvest in professional services and customer support. Some do both.

In PerfectServe, Balboa Nephrology found a partner that:

- ✓ Had the right scheduling technology with Lightning Bolt
- ✓ Had the right mix of clinical experience and proactive customer support to help them execute a transformative scheduling upgrade with tangible results
- ✓ Gave them a chance to consolidate important scheduling and communication workflows with one vendor

Today, they're enjoying improved operations, provably fair schedules, and enhanced provider and patient satisfaction. When technology (backed by the right people) works, it really works.

Marsi Friend
Senior Healthcare Analyst, Balboa Nephrology

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“Every time I call Brett, he’s so helpful and so nice. He gets right to work addressing my question, and if he can’t answer it right then, he always makes sure to follow up in a timely manner. I can tell you that’s not always the case with other vendors in the healthcare space!”

Marsi Friend
Senior Healthcare Analyst, Balboa Nephrology

PerfectServe

About PerfectServe

PerfectServe uses 30 years of expertise, AI, and advanced rules engines to simplify and automate care team communication, provider and staff scheduling, call handling, contact center workflows, and other key clinical processes. Our cloud-based software works in all settings of care and integrates with 270+ clinical, IT, and telecom systems to dynamically route important messages, calls, alerts, and other information to the right person at the right time. PerfectServe was founded in 1997 and is a trusted partner to 100+ health systems, 500+ hospitals, and 30,000+ medical practices.

GET IN TOUCH

To learn more or schedule a demo, please contact us:

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Schedule a demo

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