

Pinnacle Rehab

Microsoft Power BI is the catalyst for a culture change within Pinnacle Rehab.

Organisation

Pinnacle Rehab

Industry

Healthcare

PA Product

Microsoft Power BI

KEY POINTS

- Pinnacle Rehab works with injured workers, providing a broad selection of services to help them return to work.
- They identified a need to better analyse, display, and interpret their data and cases.
- After finding out about Power BI through their Microsoft 365 subscription, they reached out to PA for demonstrations of the data analysis and dashboard capabilities it offered.
- Whilst the productivity and efficiency benefits are clear, it is the change in culture thanks to Power BI that has been the most valued result.
- Pinnacle Rehab are always planning for the next project, and are beginning to explore Power Automate to utilise its applications and create workflows.

The Organisation

Pinnacle Rehab is a workplace rehabilitation organisation that assists injured workers return to work and normality following a workplace accident or injury. When an injury occurs, a claim is lodged with the insurer, and a decision is made about involving a rehabilitation provider. It is at this point that Pinnacle Rehab is engaged. They have rehabilitation consultants across New South Wales, including exercise physiologists, occupational therapists, registered psychologists, rehabilitation counsellors, and career coaches, all working towards the end goal. Their services range from post-surgery assistance and rehabilitation at home; establishing a return-to-work plan to avoid a repeated injury; ergonomic assessments; and career coaches if a return to the initial workplace is no longer feasible.

With a workforce of approximately 150, Pinnacle Rehab has its head office in Sydney and utilises temporary satellite offices across the state. They boast the tools to allow their team to work and communicate effectively from home, remote environments, or client sites.

Pinnacle Rehab have been partnering with Professional Advantage (PA) for more than a decade. They initially engaged PA to implement Microsoft Dynamics GP, and then the relationship grew when they selected PA to move their on-premises environment to Azure.

“When we needed to move our infrastructure, PA were an obvious choice: we already knew the service and professionalism they offered, and were very happy with our relationship.”

Charmaine Cooper, Financial Controller, Pinnacle Rehab.

You can read more about the relationship between Pinnacle Rehab and Professional Advantage in this [Client Story](#).

The Need:

Pinnacle Rehab have been successfully running a remote working model since the 2000s. However, they wanted to achieve more from an information, reporting, and data reliability perspective.

“We were trying to gather reports for our staff and managers to allow them to coordinate their workload. We wanted to assimilate all of our information into tools that would help our team to understand how they are tracking and performing in their role.”

Kevin Garvey, Director, Pinnacle Rehab.

The team utilise a case management programme and recognised that there was an untapped wealth of information of which they were not taking advantage. This data needed to be exhibited in a coherent format that provided valuable insights and could be viewed and understood across the organisation.

They also saw the benefit of consolidating their environment with a solution provider and partner, and saw the opportunity to do this with PA.

“When we moved to the Azure environment with PA, we were expanding what our partner could deliver for us: Azure, accounting software, SharePoint, Power BI, etc. We wanted our environment to be tied in with our solution provider, and we wanted to achieve this with PA.”

Kevin Garvey, Director, Pinnacle Rehab.

The Solution:

The team at Pinnacle Rehab had heard about Microsoft Power BI through their Microsoft 365 subscription, considering it as a solution to bring sophistication into their reporting.

“We had seen some collateral on Power BI so reached out to PA to find out more and seek advice. PA demonstrated Power BI and its many features, including its utilisation of maps and locations: we have staff and cases across the state so this was very interesting.”

Kevin Garvey, Director, Pinnacle Rehab.

In their role as trusted advisor, PA provided the knowledge for Pinnacle Rehab’s decision-making process, and helped them to understand what they needed behind the scenes for Power BI to represent their information.

“The purpose of this project was to increase productivity with consultants. We wanted them to have visibility over their targets and actual results. Power BI was the ideal solution for this.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.

The Results:

Prior to the implementation of Power BI, Pinnacle Rehab would run reports on a daily, weekly, or monthly basis. These would then be manually analysed and sorted before being distributed to the wider team. Managers were left with the responsibility of examining this information to determine the status of a consultant’s workload, the progress of cases, identifying cases that were more sensitive, and highlighting what needed to be reviewed more regularly.

“Now everything is done at the touch of a button. Through Power BI, each consultant can see everything that is relevant to them; they can access their cases and track their progress. They no longer need to wait for the end results; they can see what is happening live and subsequently act upon their progress in real-time.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.

The Business Improvement Team at Pinnacle Rehab would spend 3 days completing performance reports that showed results for the past month. These management reports were static and limited in the information they would provide.

“Power BI has gone beyond achieving our project objectives. We began with one simple idea, and three years later it is doing so much more than what we even thought was possible.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.

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“With Power BI, this process is live. Our team can look at results daily and compare them with previous results from days, weeks, or months ago. I don’t spend time assembling the data for them, Power BI does it all.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.



The process of accessing vital information about the time frame of cases was also labourious, with a need to access each case individually.

“Power BI now handles this. It outlines each step in the process, and therefore when the next item is due. It has greatly enhanced our productivity.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.

Not only is Power BI providing new access and enhanced visibility to their data, it is also providing brand new and innovative ways to look at and absorb the data.

“We are not just looking at data or numbers. With Power BI, our dashboards exhibit colours, dimensions, graphs, and maps, drilling down into teams, regions, consultants, or cases.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.

This brings together data from multiple sources and systems, something Power BI is adept at handling.

“We use Power BI to integrate information from across sources. One dashboard shows us data from multiple applications.”

Kevin Garvey, Director, Pinnacle Rehab.

The use of Power BI has also enhanced data accuracy. Frosina states that *“Power BI is absolutely our ‘one source of truth’”*. Therefore, there is much more diligence in ensuring the data entered is accurate.

Pinnacle Rehab have introduced ‘portfolio balancing’ because of the information presented in Power BI. With the map features, they can assess the geographical spread of cases, allowing them to ensure their team is not covering too large of an area.

“By being able to assess the geographical spread of a team member’s workload, we can minimise travel time, leading to more hours of productivity and decreasing travel fatigue.”

Kevin Garvey, Director, Pinnacle Rehab.

This is one of many ways in which Power BI has changed the culture of Pinnacle Rehab. After all, culture was a key goal for the director: if you have the right culture, which is enhanced by the right products in place, your team will be supported, driven, and able to achieve the best they can.

“Power BI has allowed us to look at every aspect of the business in a completely different way, challenging preconceptions to allow every person to be more effective in the delivery of their role. It has been a change in culture for the whole organisation.”

Kevin Garvey, Director, Pinnacle Rehab.

The team happily discuss how important it is that Power BI allows everyone to look forward, which in turn changes the way people look at and approach their job.

“Power BI is life-changing. It has instigated a big change to our company, how we do business, how our consultants operate and behave, how we see and interpret our results, and how we share these with our customers.”

Charmaine Cooper, Financial Controller, Pinnacle Rehab.

Pinnacle Rehab have impressively achieved a high level of user adoption and satisfaction.

“If you walk past anyone’s desk, they will have Power BI open on their screen.”

Kevin Garvey, Director, Pinnacle Rehab.

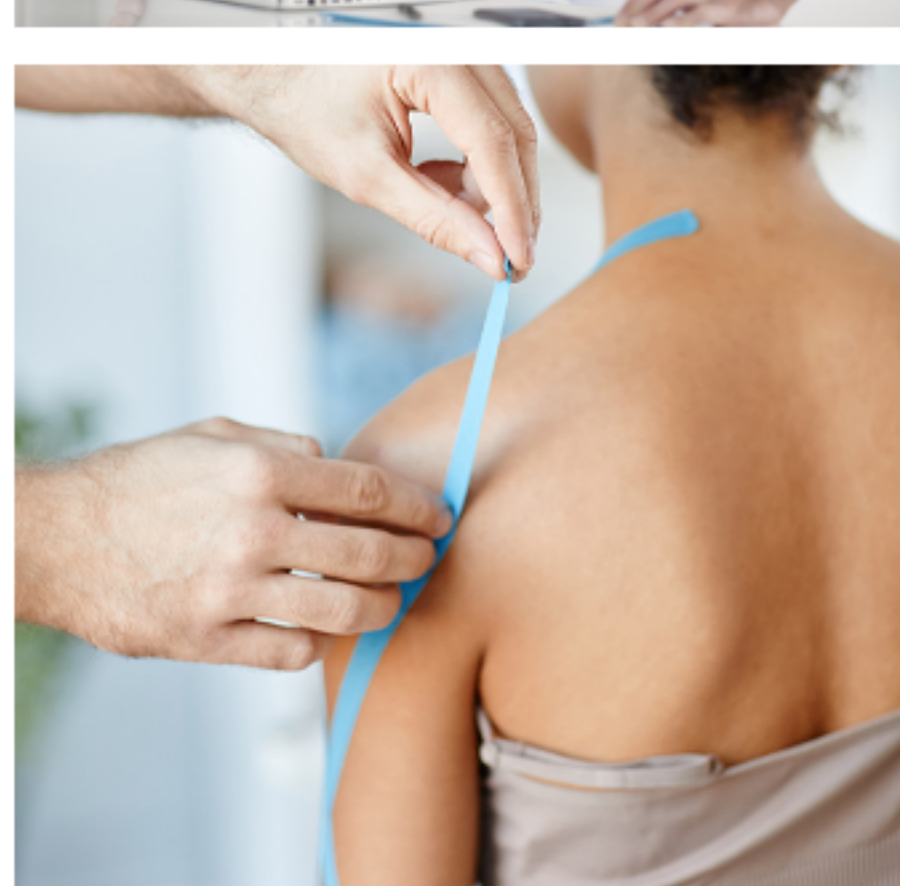
A key reason for it being popular across the organisation is its ability to bring all different functions of the business together: operations, accounts, business support, finance, and IT have all integrated processes with Power BI. It has been widely accepted by managers across the organisation, which not only breeds further adoption and engagement, but promotes a culture of always wanting more.

“Our team talk about Power BI, how they are using it, but also how they can better use it. We tailor it to them, so they welcome the freedom to come forward and express their thoughts and ideas about new ways it could work.”

Kevin Garvey, Director, Pinnacle Rehab.

You can read more about how the team at Pinnacle Rehab ensured a successful user adoption in this [blog](#).

Power BI provides a toolkit to educate and manage, which is utilised both internally—it provides new staff with the parameters of what the team are driving for—and externally. As a service provider, it is important for Pinnacle Rehab to be able to demonstrate tangible benefits around their offering.



“When we show our customers our dashboards, they are shocked that we are able to access and present this level of data, and in a way that is so easy to interpret.”

Kevin Garvey, Director, Pinnacle Rehab.

The Future:

Power BI has given everyone a broader picture of their performance, but Pinnacle Rehab now wants to focus more on improving performance.

“We want to use Power Automate as part of a project to utilise our applications on a more complex level. It is like creating workflows that will notify our team of particular required actions, but also provide actionable insights.”

Kevin Garvey, Director, Pinnacle Rehab.

These aims for Power Automate will show what needs to be done to improve results. One specific benefit of this will be for new staff as it will provide them structure and tools from the beginning.

Beyond that, Pinnacle Rehab continue to develop and focus on future progress.

“Before we ever finish a project, we are bringing forward new ideas for the next one. We are constantly thinking about improvements and the future.”

Frosina Jovanovska, Business Improvement Manager, Pinnacle Rehab.

It was a wonderful experience to discuss Power BI with Pinnacle Rehab as part of this **case study** and discover the exceptional benefits they have experienced.

It was also interesting to hear more about how to ensure a successful adoption, as illustrated in this [blog](#), and share the story of the relationship between Pinnacle Rehab and Professional Advantage in this [client story](#).