

SCALE Case Study

MSO Formation – Orthopedic

Client Profile

Size

100 Providers
National Footprint

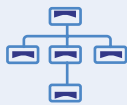
Specialty

Orthopedic

Services Deployed



MSO Formation



Strategic Planning and Execution



Integration

Overview

- + Client engaged SCALE to create an MSO integration plan, linking 4 Orthopedic groups across multiple states.
- + Provider/Investor goal was to create a national platform to optimize same store growth and grow through acquisition.
- + Client sought clarity on what they needed to focus on near term, mid-term, and longer term, with specificity and sequencing of the decided-upon workstreams.

Client Profile:

- + 4 founding groups were all multi-site, collectively represented over 100 providers, staff, ASC's.
- + Private equity backed.
- + Founding group possessed strong leadership team and capabilities, but had limited experience with MSO formation.
- + Client requested an assessment of its target's capabilities, plus a structure through which to execute an integration process/execution plan.

Execution

- + SCALE created an execution playbook for client identifying strategy for:
 - + Immediate Integration Needs
 - + Evolving National Needs
- + Plan to successfully create an executable process of integration.
- + SCALE delivered a comprehensive "100 day" Integration plan focused on key stabilization workstreams including:
 - + Finance
 - + HR
- + SCALE delivered a sequenced longer-range plan focused on key integration areas including:
 - + Marketing
 - + IT
 - + RCM
- + SCALE conducted a comprehensive review of in-place capabilities including:
 - + Corporate Leadership
 - + Finance
 - + Operations
 - + Human Resources
 - + Marketing
 - + Compliance
 - + RCM
- + SCALE conducted a deep dive into near-term capabilities of immediate acquisition targets.

Results

Client was provided with comprehensive Integration plan that:

- + Prioritized needs
- + Contained sufficient detail/roadmap for success
- + Identified internal and external resources to support success

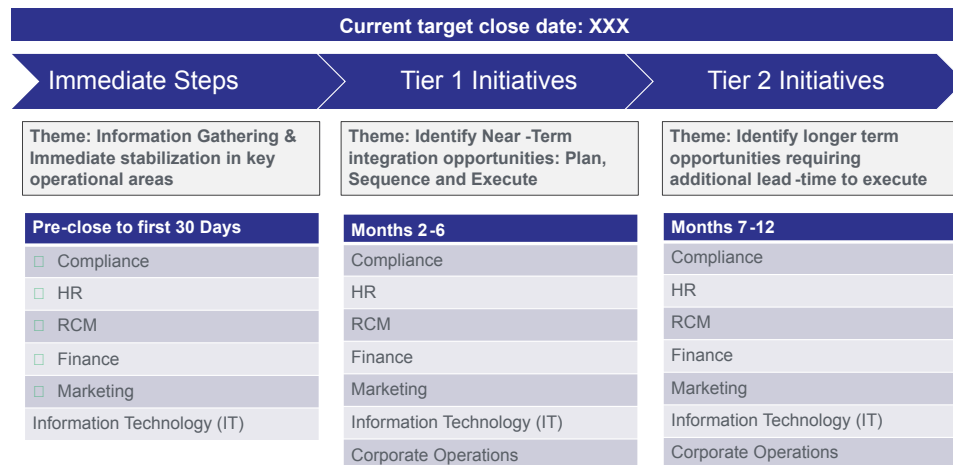
SCALE Assessment additionally assessed immediate target acquisitions' RCM,HR, Marketing capabilities to further assist client developing a management strategy beyond integration process.

SCALE was re-engaged by client to provide further custodial support in 100-day execution support in areas of need identified by SCALE/Client during process including:

- + HR
- + Marketing
- + Compliance

Integration Process – Local Needs

SCALE-Developed client-specific Workstream Process is Relatable on Nation & Local Level



Integration Process – National Integration

High Level SCALE National Playbook Narrative

