**Case Study**

# CureTech
### INNOVATIVE THERAPIES

## Optimizing Business Operations for Service, Savings and Growth

CureTech is one of the nation's largest and most trusted durable medical equipment (DME) suppliers. Its mission is to support physicians by offering advanced technologies and innovative therapies to promote quicker patient recovery, prevent post-op complications and improve patient compliance. The company is built on the desire to reimagine healthcare and improve the patient experience.

CureTech serves accounts throughout the U.S., primarily outpatient surgery centers and specialty orthopedic clinics. "Physicians prescribe our solutions to those who they believe may be at risk for developing blood clots after a surgery, or to help reduce pain, swelling, and opioid medications following an acute injury or procedure," said JD Worley, CEO of CureTech.

The company, founded in the fall of 2019 by JD Worley and two partners with deep expertise as medical device reps, had its fast growth and momentum affected by the pandemic and the shutdown of all elective surgeries. Since then, it has grown to 50 sales reps in over 22 states throughout the country.

> "The entire company is on Knack. There's nothing that's not done through the portal."

**JD Worley**
CEO of CureTech

# Building a HIPAA Compliant Startup

Upon founding the company, JD and his partners realized a first order of business was finding the right software to run their entire operation. After looking at Brightree, the de facto industry standard software, it was clear that the platform was much too expensive and its one-size-fits-all approach didn't suit their new business model.

Digging into firsthand research, JD discovered the capabilities offered by low-code and no-code app platforms and realized that choosing the no-code path would let him build exactly what the company needed. Once he'd settled on the decision to use a no-code platform, further research led him to search and identify the top-reviewed platforms available. That's how JD discovered Knack.

In vetting the platforms to make a final selection, the top requirement was to find a solution that met HIPAA compliance standards. It's a non-negotiable capability for a company in the healthcare industry. That criteria alone knocked out a few of the options under consideration. Knack's top user reviews and HIPAA-compliance plan made it the ultimate choice for building a new business.

# Knack Delivers a Customized Solution for Automation and Security

While JD doesn't have a background in programming, he's had a lifelong interest in computers and often builds things himself. Knack made it easy to build the customized app he needed for CureTech. "Knack is instrumental in the daily running of the business. It literally runs every facet of our company, from front to back – top to bottom. In the beginning, it probably took me three or four days to build out a new section. Now I can build something new in under an hour," JD said.

And Knack gives CureTech the rapid iteration and agility it needs to make changes and pivot quickly with new features or workflows. Unlike traditional software, which would require waiting in a support queue for every update, JD has the power to make changes happen almost instantaneously. "I've done it a thousand times," JD said. "I can make changes so quickly, my partners made me a t-shirt that says, Refresh Your Screen, because I literally make the change on the backend and just say, refresh your screen."

An unexpected benefit for the team has been the quantity and quality of information available from the Knack community via the online forum. JD picks up a new tip every week that helps him continue to improve and refine his app. "Everything I build keeps getting better and better as I gain more Knack knowledge. And I love that I get a little forum summary each week and can look to see if someone figured out something cool that I can implement," said JD.

Running the company on one large Knack app with interconnected modules to support all of its key use cases provides many other benefits, too.
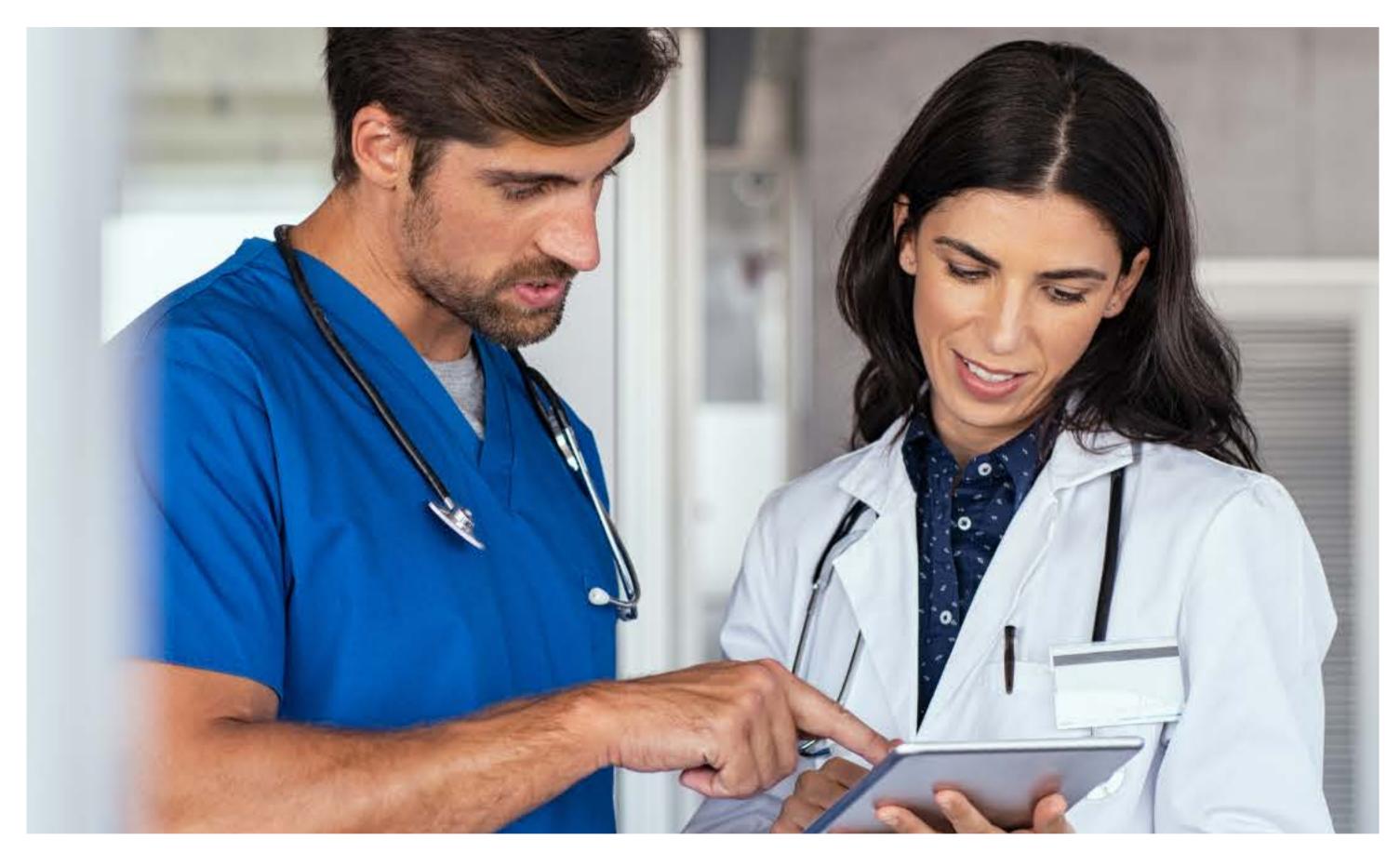
# Automation Drives Efficiency and Savings

Choosing Knack gave CureTech an immediate advantage against its biggest competitor, who was running its company on an inefficient and outdated spreadsheet model. "That's a terrible way to run a business. I wanted to make life so simple for our sales reps and administration team that everything just flows smoothly. And that's what Knack allows. Everyone loves the portal. Everything is automated," said JD.

The CureTech app is designed so users can simply click a button to complete tasks that would have taken many steps in another program. "Our portal does so many things in the background: record rules, firing out emails, generating PDFs and sending them to the appropriate billing company based on different criteria and rules. It's really incredible how complex it can be and how much I can do with one button," JD said. Using Knack's API, CureTech connected its Knack data to Formstack, which automates the creation of PDF forms and then delivers them based on a predefined set of rules.

The high degree of built-in automation makes the app easy to use, reduces the risk of human error, and cuts the need for administrative resources to a fraction of what it would otherwise require. In fact, the company grew to significant revenue with just one administrative person because the CureTech portal is so efficient and automated. "We're very proud of how big we've grown with very little administrative staff," JD said. He noted that the competitor running its business using spreadsheets has dozens and dozens of people working emails, spreadsheets and insurance claims.

The ease of use and automation built into CureTech's app adds up to significant savings. In comparing its staffing to a company that's most similar, JD says the efficiency of CureTech's processes and infrastructure reduce full-time staffing requirements. "We're saving $250,000 per year or more just from headcount costs alone."



## Just-in-Time Inventory Management

Inventory management is critical to CureTech. Being a significant expense, it must be closely monitored at all times. Knack's real-time insight into all the important inventory variables ensures the company stays on top of inventory needs to fulfill orders in a timely manner without tying up too much of the company's cash in inventory holdings. "I try to run on a just-in-time inventory process, so I'm always looking at orders in the pipeline, current inventory on hand and shipments on the way in," JD said.

Using Knack's tutorial on how to build a warehouse inventory tracking system, JD could build an inventory management solution to his exact specifications. And Knack makes it easy to keep pace with changes in company infrastructure. CureTech recently added a second warehouse location, which meant figuring out how to separate the company's inventory across the two locations. It turned out to be as simple as building some new tables and rules. "Now our Texas staff have their own page to log in and see their orders to ship out and inventory on hand," said JD

## Streamlined Employee Expense Reporting Increases Productivity

Tracking employee expense reports is often a tedious and time-consuming process. And it eats up valuable time reps could otherwise dedicate to serving customers. Knack streamlined the expense reporting process, keeping reps productive.

Through a dedicated expense module, employees can key in basic information, including the date, the reason for the expense and the amount, and then upload a scan of the receipt. The process is easy and intuitive for employees and ensures proper tracking of expenses charged to company credit cards, as well as flags for personal reimbursements, when necessary.

## Role-based User Access Ensures HIPAA Compliance

CureTech depends on Knack's role-based user access to keep information secure. All aspects of the company's operation are running on one large app with interconnections for the various modules. That means there must be unique roles for salespeople, different levels of managers and agents, order administrators, order specialists, order reviewers, bookkeeper and billing companies. Using Knack's role-based access, each user type has its own special login to view information relevant to their transactions.

Thanks to HIPAA compliance standards in the app, even physicians and the physicians' offices, primarily major orthopedic surgery centers, can log in and securely transfer patient records so CureTech can directly bill the patient's insurance. They now manage 30,000 patient records with the app and, for an added layer of security, CureTech has implemented two-factor authentication into the log in process.

To make submitting records even more efficient and intuitive, if any information is missing or needs clarification, the Knack dashboard will show a pop-up message, highlighted in bright yellow, to catch immediate attention for speedy resolution.



## Curated User Dashboards Give At-a-Glance Insights

The ability to create role-based dashboards, including an executive dashboard to spotlight key reports and metrics that are tracked constantly, provides at-a-glance insight to the most important company statistics and activities.

The dashboards are designed to provide a top-level snapshot and real-time status against goals. From the dashboard, it's easy to drill-down to review individual sales reps, patient orders, inventory, payer reimbursement trends, and more. Looking at the information constantly sparks new reporting ideas and different ways to crunch the data for even greater insights.

> ## "If anybody can dream it, I can build it."
>
> **JD Worley**
> CEO of CureTech

# What's Next for CureTech and Knack?

CureTech once again leveraged Knack's API to add new text messaging functionality. The company just launched automated text messages to patients based on record-rule criteria that's predefined in Knack.

The new functionality builds stronger relationships with patients, introducing them to CureTech. It eases the support load for physicians and surgical centers and gives patients added support during recovery. Every patient who receives a CureTech product gets an introductory message a day or two after surgery. "We let them know the product they just got sent home with is ours and if they have questions or concerns, they can call or text us," said JD.

Continuing to leverage Knack's ability to customize and automate as the company grows and evolves, CureTech stays a step ahead of its competitors that use legacy tools, and it provides a service level that both physicians and patients appreciate.

## About Knack

Knack eliminates business blindspots and improves operational excellence by connecting your data, teams, and customers. Knack is trusted by thousands of small businesses and Fortune 500 companies to increase visibility of data and manage operational processes seamlessly all with no code.

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