

# Tellescope

by Co-founder

Patient Scheduling

Patient Intake

Patient CRM

Clinical Workflow Management








Care Team Coordination

Care Management

## Details

Review Date	10/19/2023
Purchase Date	Q4'22
Implementation Time	2-4 weeks
Product Still in Use	Yes
Purchase Amount	Per user per month
Intent to Renew	100%
Review Source	Elion

## Product Rating

Product Overall		4.5
Use Case Fit		4.5
Ease of Use		4.5
API		N/A
Integrations		N/A
Support		5.0
Value		5.0

## About the Reviewer

Purchasing Team

Implementation Team

Product Oversight

## Reviewer Organization

Community Health Center

## Reviewer Tech Stack

N/A

## Other Products Considered

Healthie

Phase Zero

Salesforce (Health Cloud)

## Summary

- **Product Usage:** The product is being employed as a CRM to manage, track, and organize interactions with patients, with additional features being custom triggers, automations, analytics capabilities, and a mobile app.
- **Strengths:** Flexibility and customization to meet users' needs, responsiveness and proactive adjustments are highlighted strengths.
- **Weaknesses:** Initial experiences of bugs, although notable improvements have been seen. Additionally, the user interface could use some refinement.
- **Overall Judgment:** The reviewer is satisfied, affirming that the choice to use Tellescope was the right decision for their organization, due to its adaptability, customization features, and quick implementation process.

## Review

### **Today, we'll be discussing how your company uses Telescope. But first, could you provide a brief overview of your organization and your role there?**

I am the co-founder of a care coordination organization focused on the Medicaid population. We've established a community health worker (CHW)-led model where our team builds trusted relationships with patients in their communities, connects them with clinical and social services, and closes gaps in care. .

### **What prompted you to look for a product like Telescope?**

In Q3 of 2022, we launched in our first market through a partnership with a large managed care organization. Initially, our CHWs used tools like Jotform and Google Spreadsheets to log everything they did, but we recognized the need for a CRM system to effectively track and organize our interactions with patients. This led us to consider Telescope.

### **What requirements did you have when evaluating CRMs?**

We needed an application that would organize and allow us to report data by patient. HIPAA compliance was of course essential. We also wanted the ability to create forms with conditional logic for patient intake, track communications, automatically log touchpoints, and have calendar views and scheduling support.

The ability to set up care management workflows with task boards, reminders, and tickets was important, too. We also wanted to be able to log the referrals we made to other organizations.

As part of the evaluation process, we considered scalability, pricing, and factors such as how well we got along with the vendor's team. Because we didn't have our own engineers at the time, we wanted a CRM that would allow us to easily leverage either the CRM's own engineers or contractors.

### **Which other vendors did you consider, and how did they compare to each other?**

The final set of vendors we considered were Telescope, PhaseZero, Capable, and Healthie. We also had initial discussions with other companies like Source Health and Salesforce Health Cloud.

Capable and Source Health wound down their businesses shortly after our diligence process. The main hesitation with Healthie was that their primary focus is on EMR/EHR functionality, rather than being a dedicated CRM.

PhaseZero, on the other hand, was very similar to Telescope. Both products offered similar features, but Telescope was explicitly marketed as a healthcare CRM, which resonated with us. Pricing was comparable between the two. Ultimately, Telescope had a slight edge as the founder demonstrated a strong understanding of our vision, and I felt confident in their ability to give us exactly what we needed.

Another option we considered was Salesforce, but because we didn't have any in-house engineers, it felt like a significant investment. Telescope, in contrast, felt like a more lightweight solution to get us up and running without the extensive investment needed to implement Salesforce.

### **What was the sales process like with Telescope?**

The sales process with Telescope was incredibly smooth and easy. It actually started with them reaching out to us. At the time, we were just beginning our product evaluation process, so they were the first people we talked to. We then evaluated other products in the market, but after exploring various options, we returned to Telescope.

They were also very responsive during the sales process, which gave me confidence in the relationship we would have with them afterward. I shared our requirements with the founder, and he replied the same day, addressing each of my requirements directly and transparently. He clearly outlined what they could deliver right then, as well as what might take a bit longer to achieve.

### **What was the setup and onboarding process like?**

The setup and onboarding process was very smooth. They did the bulk of the transition work, while our product associate worked closely with them on data migration. They helped us set up our CHWs with user accounts and phone numbers, and they guided us on how to use the product correctly. The founder pretty much handled everything since it's such a small team. It was very straightforward, and we didn't encounter any issues.

### **How is the product being used at the moment? Have there been any changes in the use cases?**

Our use cases for the product haven't changed. It's still our CRM; it's the main tool that our CHWs use and the data store for all of our patient data. The product's user interface and experience have improved substantially over the last year. When we started, we were mostly using forms and the calendar functionality. While we still use those features, we now have more customized triggers and automations built in that help with our care pathways. We've also created our own database within the product for our community partners and providers, so when our CHWs make referrals, we can log those in our database. Telescope has also created a mobile app that our CHWs can use on the go. It's been great working with Telescope to develop that functionality.

In terms of analytics, Telescope provides basic analytics capabilities for all customers, such as tracking patient engagement and enrollment numbers. Additionally, they're currently working on a custom dashboard for us that will cater specifically to our needs via a separate SOW.

There's also an external patient-facing portal available (our team isn't using this for our use cases).

### **What are Telescope's key strengths and weaknesses?**

Since Telescope is still in its early stages with a small team, they're really flexible and can easily customize the product to fit our needs. They've been very receptive to our feedback and have made improvements that benefit not just us but other customers, too. It's been a big advantage for us: as we've evolved our workflows, we've been able to quickly incorporate those improvements into the product.

Overall, we've been really happy with the product. In terms of weaknesses, for the first six to nine months of using the product, there were some bugs and features that weren't working as expected, which would take a bit of time to resolve. Telescope was incredibly responsive, though; their team would usually respond within a day with a resolution. This aspect of the product has vastly improved, and its performance is now in line with industry standards, which has allowed us to focus on adding new features to the product.

One area that could be enhanced is the user interface. As we've built out more features, the navigation hasn't always been as intuitive for our CHWs to navigate as it could be, and the interface could be cleaner.

**I'm curious to know more about the integration process with Twilio and how you perceive the utility of that integration.**

We had two options for integrating with Twilio. The first option was setting up our own Twilio account and integrating it directly with Telescope. The other option was to use Telescope's native Twilio integration. We chose the latter, so Telescope handled the integration for us.

I think that's a basic requirement – any CRM should have a multi-channel platform, given that work can be done by calling, by texting, or in person. Telescope also has video-conferencing and email integrations.

**What has account management and support been like?**

The account management and support have been very solid overall. They've been responsive and proactive in addressing any bugs that have come up, and we have regular meetings with them. They are essentially an extension of our team.

**Do you feel confident that choosing Telescope was the right decision for your organization?**

Yes; for us, it has been the perfect solution. We wanted to transition from Jotforms and spreadsheets to a product that could assist us with our pilots and product-market fit as a seed-stage company. The benefits we've received in terms of adaptability and customization by going with a small company have far outweighed any bugs we've encountered. The implementation process was quick overall, and it was definitely the right decision for us.

**Do you have any recommendations for Telescope in terms of their product roadmap?**

The product roadmap is already closely aligned with our own vision. One example is the need for an Android mobile app, as we recently had a CHW join us with an Android device. Telescope is already working on that for us.

There are other upcoming features we discussed in our recent Q4 planning, such as improving the search and filtering capabilities for our CHWs so they can get a clearer view of the patients they're working with. We're also focusing on UI/UX enhancements in the near term.

**What recommendations do you have for those looking to choose a CRM?**

Many of the tools available in the market offer the basic functionality that you would need for your use cases, and you'd be able to make them work for you, but they're all at slightly different stages in terms of development, team size, and the level of support they can offer. The specifics of your organization will have a bearing on which tool you choose.