

# FROM SPREADSHEETS TO SPEED



## How Aidace Streamlines Client Onboarding

Aidace is a Medicaid workflow SaaS platform supporting skilled-nursing facilities nationwide. It helps nursing home business office teams bring structure and clarity to Medicaid eligibility operations.

As Aidace scaled, its high-touch onboarding relied on spreadsheets and disconnected tools. What had worked early on quickly became a bottleneck to growth, consistency, and team efficiency.

Aidace partnered with Improv to redesign onboarding as a unified, automated system. Manual handoffs were replaced with a scalable, repeatable experience built for growth.

## THE CHALLENGES

- **Scattered onboarding processes:** Tracked across Docs, Sheets, Pipedrive, and email, with no central source of truth.
- **Manual contract prep and follow-ups:** Slowed delivery timelines and increased the risk of errors.
- **Limited status visibility:** Required weekly huddles to reconcile updates across disconnected tools.
- **Poor scalability:** Onboarding workflows could not scale without adding costly administrative headcount.

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*Improv not only changed how I manage the business; they've enabled us to experience serious growth without increasing overhead.*

— Eli Kaplovitz  
CEO & Founder

## THE ENGAGEMENT

### Primary Systems Involved

Process Street — Pipedrive — Zapier

Within eight weeks, Aidace launched their new onboarding system and tripled onboarding capacity without increasing administrative headcount.

### 1. Untangling the Onboarding Maze

We mapped more than 70 onboarding steps across contracts, compliance, and client coordination to identify where complexity and risk were accumulating. This aligned the team around a unified onboarding model built to scale.

### 2. Designing for Volume, Without Chaos

We implemented a master Process Street workflow that automatically generates facility-specific onboarding checklists and tracks progress in one centralized dashboard. Training, data pulls, and service-level expectations were embedded directly into the workflow.

### 3. Connecting the Tech Stack

We integrated Pipedrive, Google Drive, and PandaDoc so onboarding triggers from deal close, with contracts generated and systems kept in sync automatically.



## OUTCOMES ACHIEVED

Automating the onboarding process delivered measurable efficiency gains while improving speed, accuracy, and scalability.



### **85% faster contract bundle prep**

Reduced time to prepare 25 contracts from 2–3 hours to under 25 minutes, removing a major onboarding bottleneck.



### **80% faster individual contract creation**

Cut contract generation time from 5–6 minutes to under 1 minute, standardizing contract output across clients.



### **Deferred 3–4 admin hires**

Enabled onboarding capacity to scale 3x without increasing operational headcount, preserving margins during growth.



### **180+ staff hours/year recovered**

Eliminated weekly “where-are-we” status and reconciliation meetings, freeing teams for higher-value work.



### **Centralized visibility**

Ensured every decision, document, and approval lives in one system, creating a single source of truth.

# 3x Onboarding Capacity

Achieved without increasing administrative headcount or adding operational overhead.



*Our sales guy said the contracting phase went from a two-to-three-hour slog to about 25 minutes... huge. And that's not including all the follow-up and all the system maintenance time saved for me.*

— Eli Kaplovitz  
CEO & Founder



*Very happy with the overall results... The new process is saving me a couple of hours per client; even more on some of the larger ones.*

— Chaim Frankel  
Account Executive

# CURIOUS HOW THIS COULD WORK FOR YOU?

<https://improvizations.com/partners/process-street>

Reach out to **Bryan deSilva**, Managing Partner

