

# A Layered Approach

to Nephrology Scheduling & Communication



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# Agenda

Balboa Overview

The Scheduling Challenge

Failed First Attempt

PerfectServe Partnership

Key Results & Lessons

Q&A

# Balboa at a Glance

- Founded over 50 years ago
- Manage 20,000+ patients
- Operate 18 clinical offices and 88 dialysis clinics across San Diego, Orange, and Imperial Counties
- 56 board-certified nephrologists and 8 advanced care practitioners
- Mission is to improve kidney health in an environment built on compassion, empathy, and trust

# Who We Are



**Sidney Montes**

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Director of Operations  
*Balboa Nephrology*



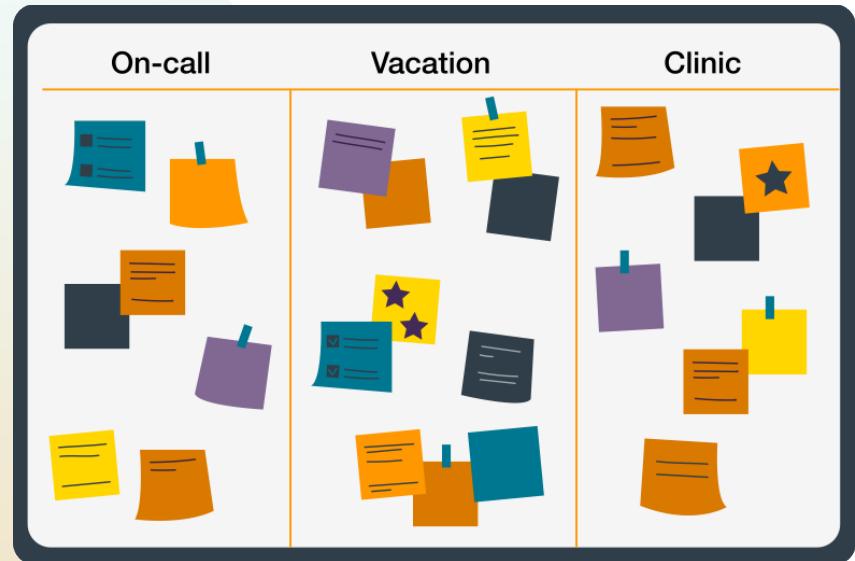
**Marsi Friend**

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Senior Healthcare Analyst  
*Balboa Nephrology*

# Life Before Lightning Bolt

- Manual, fragmented scheduling
- Providers sometimes building schedules late at night (“pajama time”)
- Different tools:  
Google, Outlook, paper
- Schedules were unpredictable—day, week, or month at a time



# A Vendor That Fell Short

- Tried a well-known scheduling vendor
- Couldn't handle nephrology complexity
- No layering capability
- Customer service lacking
- Rollout was never completed

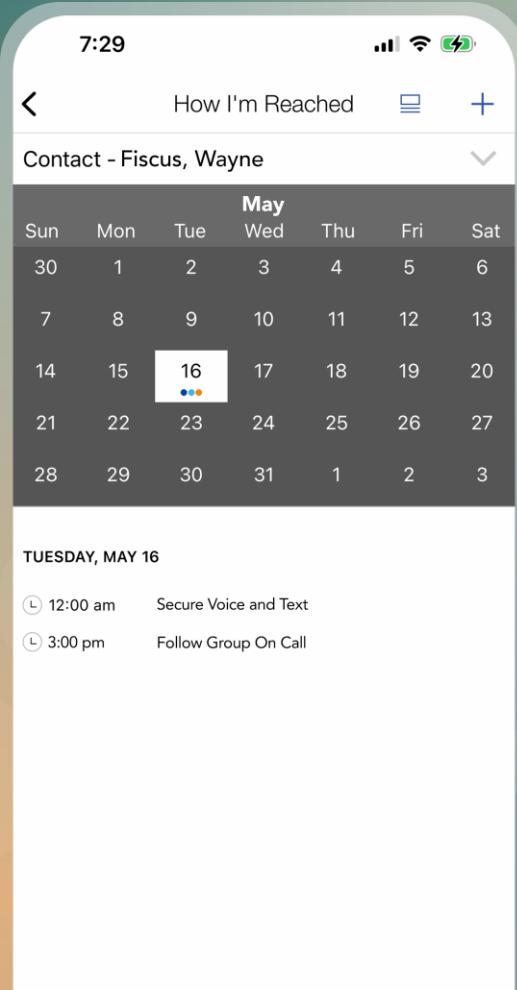


# Finding the Right Partner

- Balboa was already using PerfectServe for clinical communication
- Positive experience led to exploring Lightning Bolt
- Pilot:
  - Started with 11 users at 1 location
  - Scaled to 65 users across 11 sites



# Results



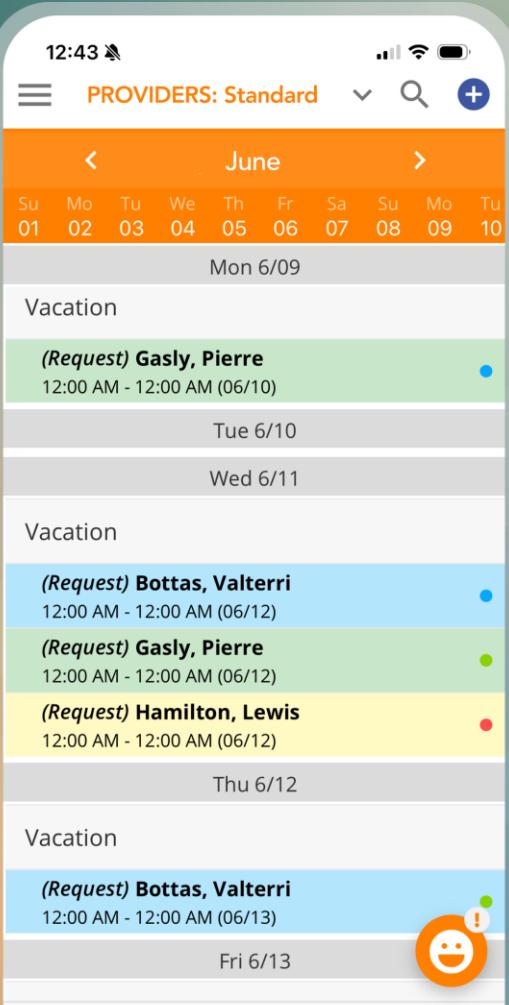
# Scheduling System That Finally Works

- Optimized, accurate schedules in hours instead of “hours and hours” of manual work
- Six-month advance scheduling
- Direct integration with PerfectServe communication platform
- Proven fairness and provider satisfaction



# Layering: The Game-Changer

- Layer different duty types
  - Call → dialysis → clinic
- Eliminates conflicts and ensures coverage
- Key differentiator vs. previous vendor



# Predictability for Providers & Patients

- Quarterly schedules published 6 months out
- Easier vacation planning and personal scheduling
- Patients can book earlier, improving continuity of care

# Data-Driven Fairness



PROVIDERS: ALL SHIFTS 05/01

	Day Call	Post Day Call
Perez, Sergio	7	7
Bottas, Valterri	11	7
Gasly, Pierre	7	6
Hamilton, Lewis		
Norris, Lando		
Sainz, Carlos		
Russel, George	2	1
Verstappen, Max	4	3
Total	31	24

- Equalization reports show balanced workload
- Providers trust the process because they can see the data



# Scheduling + Communication Integration

- Automatic updates from Lightning Bolt to PerfectServe
- No manual re-entry or mismatched schedules
- Over 3 months:
  - **6,112 total interactions** (10 accounts/27 practices)
  - Sorted into **90% routine/10% urgent**
  - **Median urgent read time:** 4m 54s
  - **Median callback time:** 6m 20s
  - **Nearly 1,000 callbacks** and **2,100 voicemails handled automatically**

# Advanced Reporting

ASSIGNMENT	Tu 10/10	We 10/11
TALLIES		
Providers Scheduled Today	8 / 9 (-1)	9 / 9 (+0)
Rooms Utilized	-14 / -20 (+6)	-17 / -20 (+3)
Call	Bhat	Bhat
	Need Coverage	Need Coverage
Night Call	Baba	Baba
Shift 3	FOSTER	FOSTER
Shift 4		BROOKS
Shift 5	CHAVIZ	CHAVIZ
Shift 6	Chwiecko	Chwiecko
Shift 7	Date	Date
Shift 8	Dr. Lee	Dr. Lee

- Export to Excel + Python for custom analysis
- Confirm dialysis coverage, track free time, spot overbooked or underbooked providers

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“Every time I call Brett, he's so helpful and so nice. He gets right to work addressing my question, and if he can't answer it right then, he always makes sure to follow up in a timely manner. I can tell you that's not always the case with other vendors in the healthcare space!”

**Marsi Friend**  
*Senior Healthcare  
Analyst*



# Lessons Learned

#1

Technology alone  
isn't enough—  
**partnership**  
**matters.**

#2

Integration of  
scheduling &  
communication  
**delivers outsized**  
**value.**

#3

Data visibility  
drives more **trust**  
**and fairness.**

# Q&A

# Thank you!



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