



# Medi-Bill Professional

## Practice Consultant Trusts His Clients with Kareo

Dan Gilbert admits that he's an IT guy at heart – and a bit of a perfectionist. He loves making sure every detail is right, whether it's in a network installation, implementing an enterprise-wide software solution, or sleuthing out unpaid insurance claims. So when he started Med-Bill Professional, a consultancy specializing in medical practice management, he spent a full six months researching the best software platform.

### Challenge: Create a Dynamic Partnership

"My vision was to establish a unique consulting niche," says Gilbert. "Most physicians don't have time to think about their technology needs. If they're putting energy into their systems, they're taking attention away from patient care and revenue generation. What they want and need is someone who can look at the entire picture, including details like bandwidth. Someone who will make reliable recommendations about system selection, hold their hand through the implementation and training process, and then ensure that everything runs smoothly afterwards. The foundation for all this is having powerful, trustworthy EHR and billing systems."

### Solution: Solid Structure within Kareo

Kareo came out head and shoulders above its competitors in Gilbert's research. "I had worked with many EHRs in my previous life, including eClinicalWorks, Allscripts and Medical Office Online. I was well aware of potential pain points," he says.

"The main thing I liked about Kareo was that, without exception, every person I spoke with was tremendous—competent, pleasant and responsive. The software was very user-friendly. It had a nice user interface that was very straightforward and easy to teach," he continues.

"Kareo was robust enough to handle very large practices, but also intuitive enough for smaller ones. It gave me the analytics I would need to be an



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effective consultant. Although Kareo is headquartered in California, they maintain operating hours that accommodate someone like me in Michigan.”

## Challenge: Getting Clients to Change

Gilbert discovered that many prospective clients thought they were satisfied with low-end or outdated software. “I couldn’t believe how confusing and limiting some of the systems out there were,” he notes.

As an example, he cites the complicated codes one system required. “Instead of listing an insurer’s real name, like Medicare Plus Blue, the software required acronyms. Users had to keep looking at cheat sheets to decipher them, which was a real nuisance and created a lot of errors. It wasted so much time and energy. Why not just call the insurer by their real name, like Kareo does?”

## Solution: Recommend an Intuitive, Integrated System

When Gilbert takes on a new consulting client, he mandates using Kareo for billing management. “If they don’t want Kareo for billing, I tell them to find someone else to help them. It’s that simple,” he comments.

On the other hand, if a new client is using a different EHR that integrates with Kareo’s billing system, he recommends Kareo but doesn’t push it. “Once people get accustomed to software work-arounds and have come to rely on a specific process for their cash flow, they are hesitant to switch. After all, their cash flow is the life blood of their business. I’ve found that migrating software is the most difficult decision for physicians to make,” Gilbert says.

“I’m an IT guy, not a salesman,” he continues. “I simply tell physicians why I hand-picked Kareo for myself and show them features that they’re missing out on. Then I explain how much time I spent doing my homework so I would know for sure which system was best. People bring in a consultant like me for a reason. They’re looking for suggestions from an expert. In the long run, most practices end up following my advice and switching to Kareo for both billing and EHR.”

Although Gilbert knows that he can increase a client’s cash flow, thanks to his consulting expertise and knowledge of Kareo, he avoids making promises. “Generally, I see at least a 10% improvement in a practice’s revenue stream after Kareo and I come in,” he says. “But I don’t need to tell them this at the outset. They usually don’t even realize how much things can improve until we start working together.”

## Kareo Solution



**KAREO BILLING**



**KAREO CLINICAL**



**KAREO ENGAGE**



**KAREO TELEHEALTH**



**KAREO ANALYTICS**



**PATIENT COLLECT**



**PATIENT STATEMENTS**

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## Solution: Clear Expectations

Gilbert prides himself about being honest with clients about the implementation process. “A migration typically takes between 90 and 120 days before the new system is fully operational. During that time, there will be an inevitable downturn in cash flow. That’s scary for any businessperson. But then when Kareo is up and running, the money starts flowing again—with much better transparency, efficiency and analytics. Once physicians understand this, they can trust that the revenue is still there. It’s just being delayed a bit. This helps them to avoid panicking.”

## Results: \$110K Revenue from One Weekend’s Work

One day a physician called Gilbert for help. “He had already adopted Kareo for billing but was having serious revenue problems. In fact, he had just taken a \$20,000 cash advance on his personal credit card to make payroll. I knew something had to be wrong,” Gilbert explains.

“After just 20 minutes looking at his Kareo set up, I discovered 890 claims just sitting somewhere in cyberspace. This was most of his business for the past three months! It turned out that nobody in his office had taken the time to learn Kareo. He asked if I would drop everything and fix the problem for him. I spent the entire weekend opening every single one of those claims and addressing them. That was on December 6. By the end of the month, he had brought in \$110,000. That allowed him to pay off his credit card advance, give his staff Christmas bonuses, and deposit \$80,000 in his bank account. All from one weekend of consulting work!”

## Results: From Bankruptcy to \$70K a month

Another big win occurred when a physician confided to Gilbert that she was on the verge of going broke. “I visited her office but refused to work with her. We weren’t a good fit. I’m a fanatic about details with all my ducks in a row. And she lived in total chaos. Her entire practice was a mess. Not surprisingly, she hadn’t collected a salary for two full years,” he says.

“After I turned her down, she called back, begging me to save her from bankruptcy. I made my conditions very clear. If I saw one thing that was not 100% above board, I would walk out. Same thing if she cut any corners. That’s the way I work. I need to be able to sleep at night, knowing that my accounts are accurate. Amazingly, she agreed, and we started working together.”

“Whatever the question happens to be, I’m confident that I’ll have a good answer—because my experience is backed up by dynamic software like Kareo.”

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The first few months were rocky, he says. “I did the fastest Kareo implementation of my career, working day and night. In the process, I found that she had claims from eight months earlier that had never been filed. She had completely lost contact with one of her billers in another state. I’d never seen anything like it,” Gilbert notes.

“Her first payment arrived just 16 days after I installed Kareo. It took four months for Medicare to start coming through. In eight months, her practice was in the black. Working with me, her income tripled and her revenue went from zero to \$70,000 a month.”

## Conclusion: Confidence and Competence

Does Gilbert ever worry about working so closely with Kareo? “Absolutely not. I know that Kareo will provide me with the tools I need to supervise every level of detail in a medical business. It’s dynamic enough to manage a very large practice, and simple enough for a single practitioner to use. I’m never nervous when I sit down with a prospect or new client. Whatever the question happens to be, I’m confident that I’ll have a good answer—because my experience is backed up by powerful software like Kareo.”

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Join the **65,000 providers** in all **50 states** that rely on Kareo to grow their business. Start optimizing your practice’s success today.

## Results



**Zero to \$70K/month**  
revenue growth for  
one practice



**\$110K revenue**  
in 4 weeks for  
another client



**10%+ cash flow**  
improvement in  
most practices