

Case Study: Optimizing Revenue Cycle Operations for a Nonprofit Organization

Helping nonprofit leadership uncover revenue cycle inefficiencies, strengthen internal controls and build a more reliable operating infrastructure.

Client Challenge

A nonprofit organization needed greater visibility into whether billable services were being captured, submitted, and reimbursed effectively. Leadership was concerned that there was missed or delayed billing, but lacked a clear understanding of workflow, staff responsibilities and internal control throughout the revenue cycle.

Leadership wanted answers to four main questions:

- Are there **breakdowns in procedures** resulting in delayed or missed transactions?
- Is **updated documentation** of the billing process maintained?
- Are **deadlines** for submitting billing claims being met?
- Are **staff roles** clearly defined and followed?

The organization needed an independent operational review of its revenue cycle with actionable recommendations to optimize revenue, improve efficiency and strengthen oversight.

My Approach

I began by interviewing the revenue cycle team members to review the procedures each of them followed in performing their daily job functions; to learn where responsibilities were unclear; and to identify process gaps that created risks.

I then developed a comprehensive *Revenue Cycle Operating Procedures Manual* and delivered a *Findings and Recommendations Report* to senior management. Together, these deliverables gave leadership the practical tools needed to assign accountability, improve workflows, strengthen internal controls, reduce manual effort, and support more efficient and consistent billing procedures.

Client Impact

The engagement gave leadership a practical, actionable roadmap for strengthening revenue cycle operations that include:

Aligned staffing with operational priorities: I identified opportunities to consolidate or restructure positions, reducing duplication of efforts and better matching resources to departmental needs.

Improved accountability and continuity: Documented procedures ensured ongoing department operations, preserved institutional knowledge, workflow efficiency and clearly defined roles and responsibilities.

Strengthened billing capability: Targeted training needed was identified to help staff use a newly implemented billing module more effectively, supporting consistent billing transactions and claims processing.

Reduced manual effort and error risk: Replacing Excel spreadsheets used to input billing and remittance data with automation reduced staff time and manual input errors.

Improved document security and access: Moving sensitive document sharing from email to a secure internal shared drive improved efficiency, access control, and protection of confidential information.

Strengthened financial safeguards: Implementing separation of duties, a key internal control, for checks and online remittances reduced exposure to unauthorized or fraudulent activity.

Why It Matters

Revenue cycle challenges can slowly erode financial performance, especially when responsibilities are undocumented and manual processes limit visibility. This engagement helped nonprofit leadership move from uncertainty to action with a clear operating foundation, stronger internal controls, and practical recommendations designed to support sustainable revenue growth.