Mental Health Cooperative

NONPROFIT
HEALTHCARE

Mental Health Cooperative's Digital Transformation with Okorio

OVERVIEW

Mental Health Cooperative (MHC) is a rapidly growing nonprofit organization committed to delivering exceptional, comprehensive services that improve health outcomes, remove barriers to care, and foster hope in the lives of those they serve.

As their impact and operations expanded, so did the complexity of their financial planning needs. To continue supporting both their mission and internal teams effectively, MHC partnered with Okorio to implement Workday Adaptive Planning, a scalable, cloud-based FP&A solution that empowers nonprofits to plan smarter, respond faster, and drive better outcomes.

PROJECT OVERVIEW

As part of their vision to allow employees to thrive in serving their communities, Mental Health Cooperative began to search for a way to allow their organization to put more time back into data-driven analysis and spend less time on manual processes. They soon underwent their initial implementation of Workday Adaptive Planning in 2016.

ISSUES FACED

Their initial implementation faced several critical issues:

01 Scalability
The original configuration had multiple personnel sheets and struggled to effectively support the rapid growth they were experiencing.

02 Flexibility
Reporting capabilities were limited based on the previous configuration, which was primarily made of standard sheets. This limited the use of pivotable components, making it difficult to generate custom reports to gain quick insights.

03 Streamlined Planning
Training and adoption of the latest features and functionality with Dashboards and Process Manager needed to take place in order to grow their internal team and aid in the decentralization process.

RESOLUTION OF ISSUES

Okorio conducted a thorough assessment of the existing planning configuration and worked hand-in-hand with MHC through a strategic and methodical approach to address these challenges head on.

- **Model redesign.** Okorio reviewed and redesigned the planning sheets to use dimensionalized data structures, enhancing data granularity without sacrificing performance.
- **Enhanced flexibility.** The new dimensionalized data approach improved reporting flexibility, allowing MHC to pivot and filter reports in response to changing business demands.
- **Automation of processes.** Using Workday enhancements, MHC added more budget owners and adopted a crucial rolling forecast in 2024.

THE SOLUTION

By partnering with Okorio, Mental Health Cooperative successfully transformed their Workday Adaptive Planning instance to better support their organizational growth and operational needs. The comprehensive updates led to a more scalable, flexible, and efficient planning environment. With more automation and streamlined processes, partnered with enhanced reporting capabilities, Mental Health Cooperative is now well-equipped to respond swiftly to organizational change, ensuring their continued success and future growth.

In 2023, Mental Health Cooperative engaged with Okorio for a Model Review of their Workday Adaptive Planning system.

> *As part of this measure, they began to evaluate FP&A tools in 2016. At that time, it was just two of us building what we needed from scratch in Excel.*
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> **Senior Financial Analyst** • Mental Health Cooperative

Okorio is redefining Workday consulting and services by acting as your performance partner, not just an implementer or traditional AMS. Our advantage is our team of passionate senior experts and former Workday professionals who deliver real outcomes across HCM & Financials, Adaptive Planning, AI & Analytics, and AMS. We design practical solutions grounded in operational reality that empower your team to become truly self-sufficient. By embedding intelligence into every engagement, we turn Workday into a decision-making engine, connecting its data to your broader business story. We don't finish and disappear. We build momentum, independence, and long-term success.