

Streamlining healthcare business operations with work management

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FROM STRATEGY TO ACTION

Streamlining healthcare business operations with work management

asana

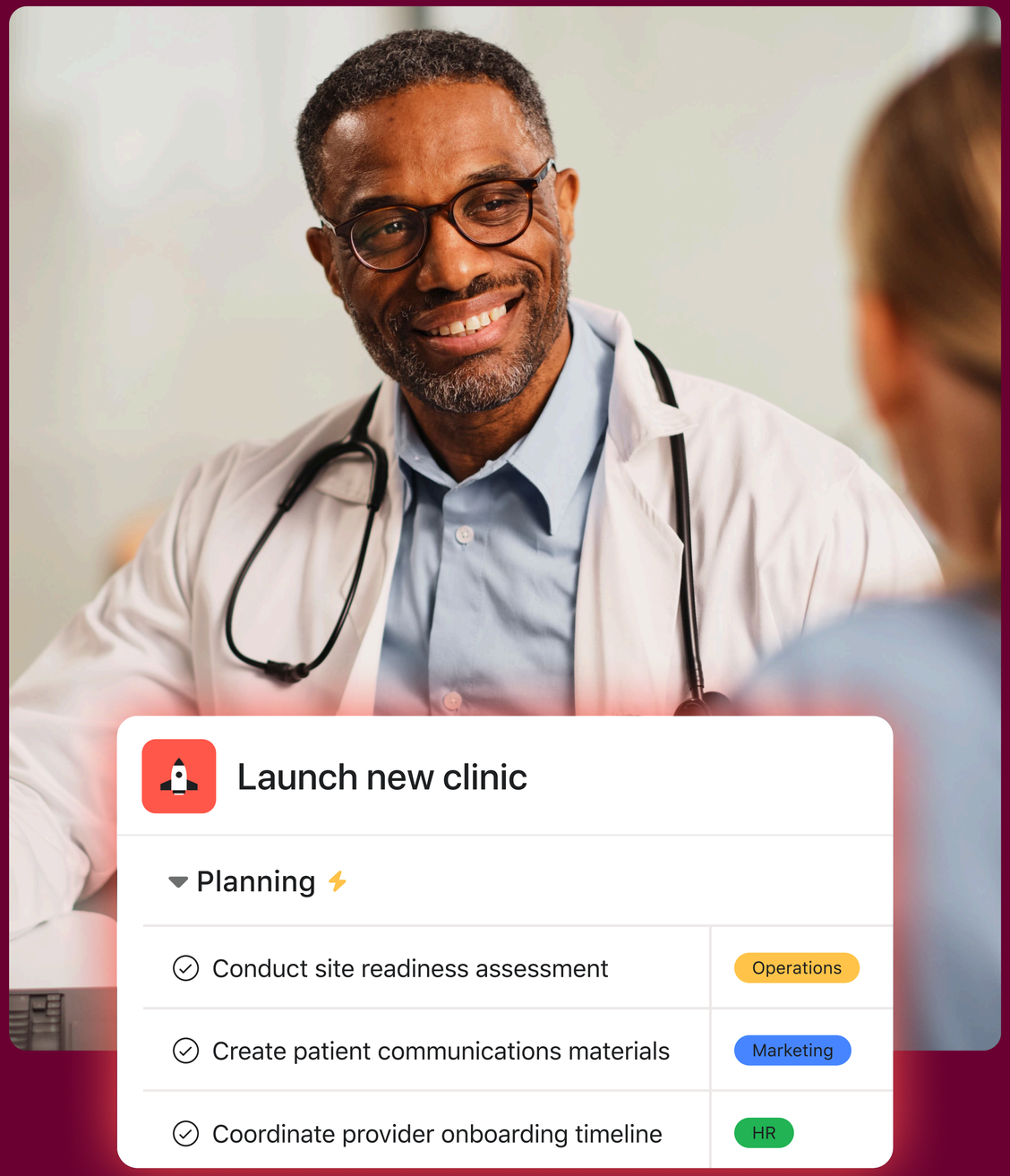


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A new era of healthcare requires a new way of working

Healthcare organizations are under growing pressure to deliver better outcomes, improve equity, and reduce costs. Whether the focus is regulatory change, operational transformation, or new care delivery models, the need is the same: a clear path from strategy to action. But for many, that path is anything but clear.

While many have a vision for delivering better, more coordinated care, not all have the operational foundation to support it. Strategic goals aren't clearly connected to daily work. Teams operate in silos, duplicating efforts or moving in different directions. Visibility is limited, making it hard to spot risks and course-correct in real time. And compliance, which is critical to performance and accountability, is tracked manually, leading to administrative overhead and increasing the likelihood of errors.

In short: strategy alone won't cut it. To deliver on complex healthcare initiatives, organizations need operational clarity—and the infrastructure to move quickly and scale with confidence.

Operational excellence is the missing link between strategy and action

While much of the industry's focus has been on clinical transformation, the non-clinical side—operations, strategy, compliance—is just as essential. These teams are tasked with coordinating complex initiatives, meeting quality benchmarks, and ensuring audit readiness. And they're expected to do it all while managing growing administrative demands.

Too often, they're working without the tools they need to succeed.

Spreadsheets, slide decks, and disconnected systems weren't built for today's healthcare environment. Without a shared system, it's easy for strategic plans to stall, deadlines to slip, and performance to suffer.

Technology can help—if it's actually built for the job.

As care models and expectations evolve, the operational side of healthcare must evolve too.

Healthcare organizations don't need more tools. They need tools that actually work for them: secure, adaptable platforms that reduce friction, support cross-functional collaboration, and embed compliance into everyday work. Most importantly, they need solutions that are flexible enough to support complexity and powerful enough to help turn care strategies into day-to-day reality.



Who this playbook is for

This playbook is designed for healthcare leaders tasked with driving operational transformation—from strategy and transformation officers to quality improvement leads and compliance directors. Whether you're focused on regulatory readiness, scaling care initiatives, or operationalizing strategic plans to drive outcomes, the goal is the same: bridge the gap between big-picture priorities and everyday execution.

Why healthcare organizations need better tools, not more complexity

With the right platform, teams can:

- Connect high-level, strategic goals to day-to-day execution
- Simplify compliance and quality tracking by embedding it into everyday workflows
- Break down silos between payers, providers, and departments
- Streamline the rollout and tracking of care initiatives
- Build transparency and accountability into cross-functional work
- Monitor performance and adjust in real time

What to look for in a platform built for healthcare operations:

- **HIPAA-ready, secure systems** that support sensitive workflows and meet regulatory requirements
- **Goal-setting and reporting tools** that link strategic priorities to daily work
- **Automation and AI capabilities** that reduce manual effort and free up time for high-impact tasks
- **Cross-functional visibility** to keep departments and teams aligned
- **Customizable templates and workflows** to standardize and scale key initiatives
- **Built-in audit trails** and accountability features to simplify compliance and support audit readiness

Challenge	What's at risk	What's needed
Strategy stalls in execution	Missed benchmarks, fragmented work	Goal-to-work connection, cross-functional visibility, real-time progress tracking
New provider onboarding lacks consistency	Delayed care, higher costs	Standardized workflows, automated handoffs, onboarding status dashboards
Care initiative rollouts are fragmented	Compliance gaps, slower rollouts, uneven outcomes	Repeatable templates, milestone tracking, real-time rollout visibility
Internal alignment on high-stakes contracts is missing	Missed deadlines, reporting gaps, financial penalties	Centralized timelines, program-level tagging, dashboards for contract deliverable tracking
Compliance tracking is manual	Audit delays, performance risk, administrative burden	Smart workflows, recurring task automation, built-in audit trails

Connecting strategic goals to everyday execution

How work management can help

- Link strategic goals—like access, equity, or care quality benchmarks—to the specific projects and tasks that drive them forward
- Make it easier to track progress toward healthcare initiatives and identify risks before they become blockers
- Ensure departments like care delivery, compliance, and population health are aligned around the same priorities
- Provide real-time visibility into progress and outcomes so teams can stay focused and course-correct as needed

It’s one thing to set bold, strategic goals. Delivering on them is something else entirely.

Most healthcare organizations know the outcomes they want to achieve, like reducing ER visits or increasing preventive screenings. But when performance metrics live in one system and the work required to move them forward lives in another, execution breaks down. Teams lose clarity on what they’re driving toward. Leaders lose visibility into what’s moving the needle. Progress stalls.

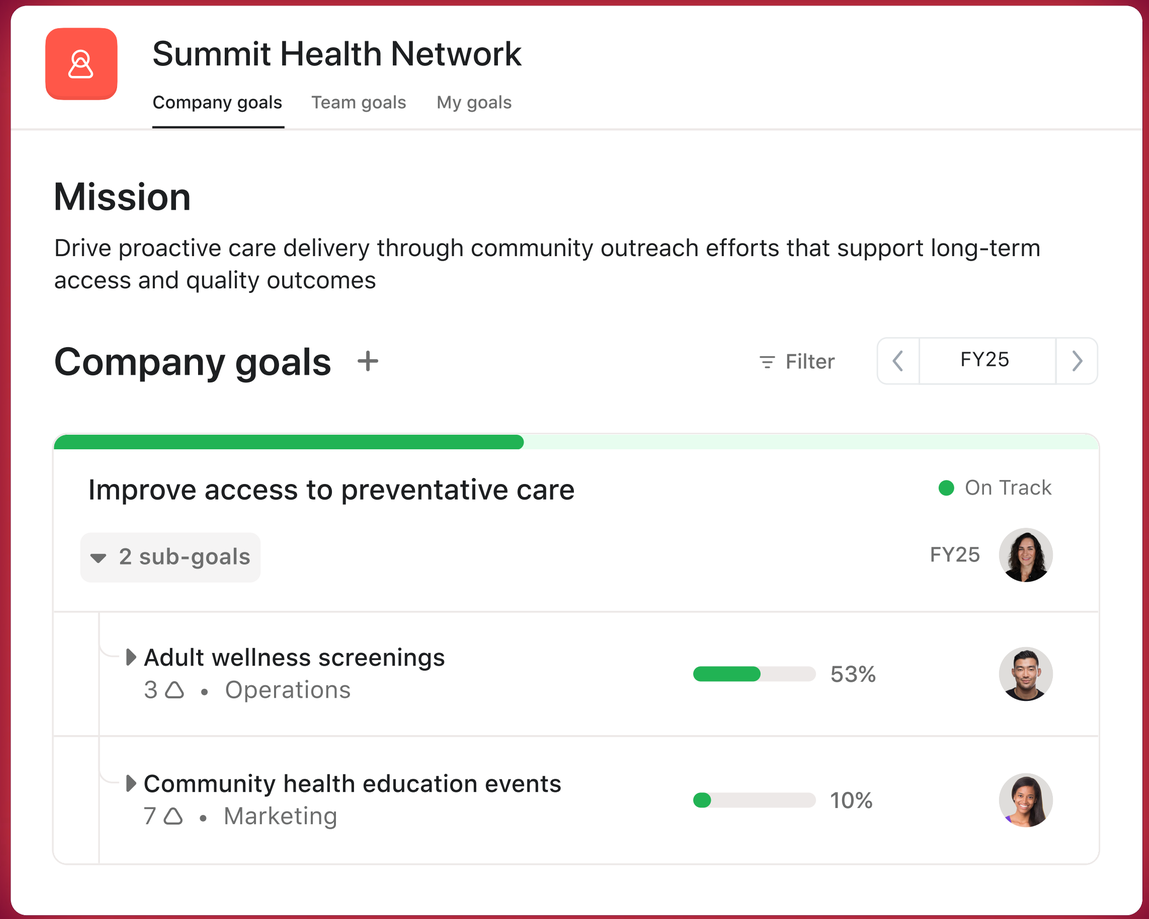
Bridging that gap takes more than setting targets. It requires connecting every goal to a concrete plan, with clear owners, milestones, and timelines. When work and strategy are aligned, teams stay focused on what matters most and leaders gain confidence in what’s working. And when it’s time to report progress, everyone knows how the work maps back to the mission.

Work management in action

Coordinating community outreach events with a single source of truth

At a not-for-profit health system serving communities across multiple states, the community outreach team uses Asana to manage events focused on prevention and education. From adult and child wellness screenings to raising awareness around cancer prevention and cardiovascular health, these programs are critical to meeting long-term quality and access goals.

Before Asana, outreach efforts were spread across emails, making it hard to stay organized or tie events back to strategic priorities. Today, the team uses Asana to centralize event planning, coordinate across departments, and ensure outreach efforts support broader goals. By streamlining their approach, they've enhanced access to preventive care, strengthened community partnerships, and advanced health equity across the populations they serve.



Connect work to system-wide goals

Use goals to link organizational priorities to department-level work, so every team understands what they're driving toward.

Monitor alignment across strategic initiatives

Use portfolios to group related projects, like community outreach and education programs, into a single view that supports shared outcomes.

Measure progress toward quality benchmarks in real time

Use reporting dashboards to give leaders and teams real-time visibility into how initiatives are tracking against strategic goals.

Why it matters for healthcare

When day-to-day work aligns to system-wide goals, progress follows. Connecting execution to strategic targets helps healthcare organizations deliver better outcomes, improve accountability, and stay on track.

> Healthcare is complex by nature, but with Asana, we've turned that complexity into coordinated action. It helps us unify our clinical, communications, and operational teams around shared goals across multiple locations. As CEO, it gives me direct oversight of what's happening on the ground without needing layers of assistance. That clarity and connectedness allow us to respond faster, execute smarter, and stay focused on delivering exceptional care to our patients.

Dr. Ifunanya Ilodibe,
Chief Executive Officer,
EHA Clinics

Streamlining new provider onboarding

How work management can help

- Create standardized onboarding plans that ensure consistency across locations, specialties, and care settings
- Automate handoffs between HR, credentialing, compliance, and clinical operations teams
- Track licensing, credentialing, and documentation steps in one place
- Gain visibility into onboarding timelines to surface delays, reduce administrative overhead, and accelerate care readiness

Provider onboarding plays a critical role in delivering high-quality, cost-effective care. Every day a provider isn't up and running is a missed opportunity to expand access, support outcomes, and recover revenue.

But onboarding is a complex, cross-functional process. Teams need to collect credentials, verify licenses, coordinate training, and set up systems access, often across departments and locations. Without structure, it's easy for tasks to slip, documentation to scatter, and handoffs to stall. And when onboarding lags, care delivery does too—leading to missed appointments, delayed outcomes, and higher administrative costs.

To keep care delivery on track, healthcare organizations need a structured, repeatable onboarding system. With pre-built workflows, clear handoffs, and real-time dashboards, teams can reduce manual work, simplify compliance tracking, and get providers delivering care faster.

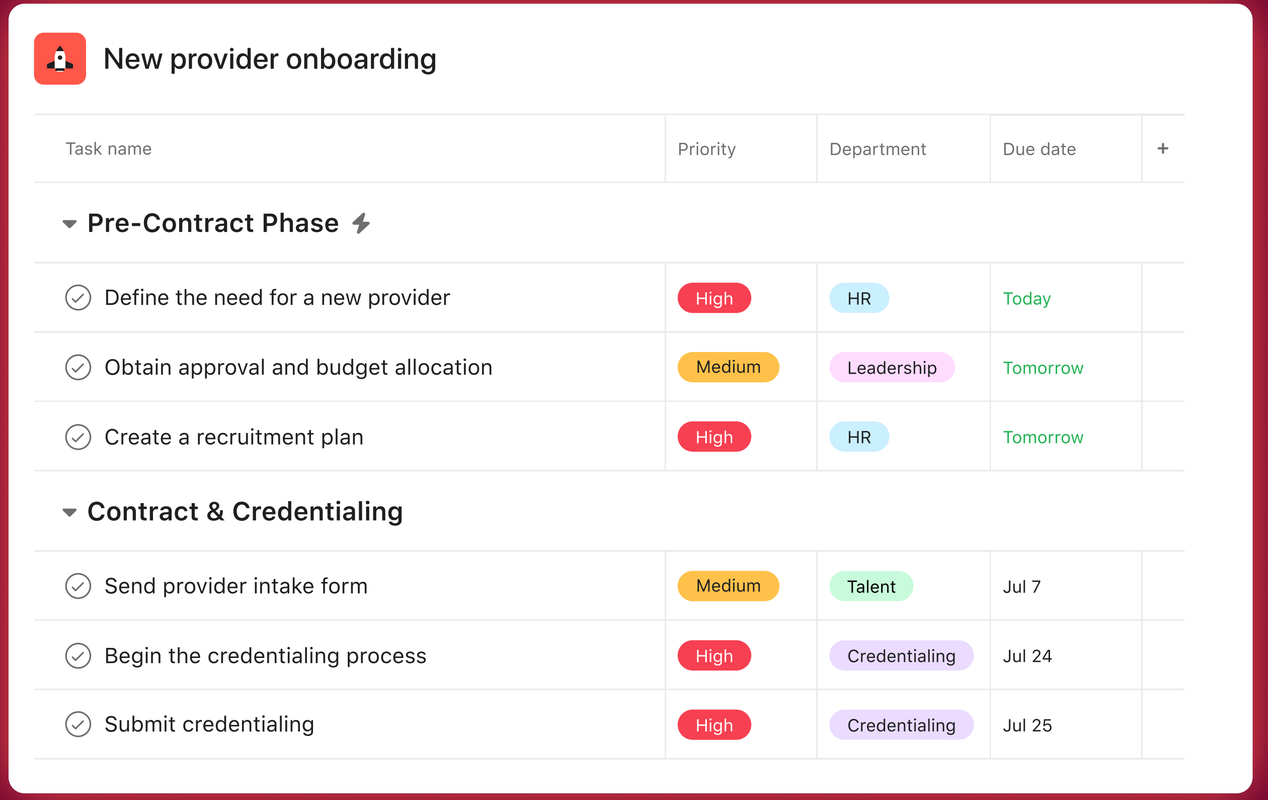
Work management in action

Standardizing provider onboarding to accelerate care delivery

A regional health system with multiple hospitals and outpatient centers was facing challenges with provider onboarding. The process was complex and manual, with key steps—like credentialing, license verification, EMR system access, and mandatory compliance training—spread across email threads and siloed tools. With multiple departments involved and no centralized system, tasks often fell through the cracks, delaying providers' ability to see patients and introducing compliance risks.

With Asana, they built a standardized onboarding process. New providers fill out a single intake form, which automatically kicks off a pre-built workflow. Tasks are routed to the appropriate teams—HR, credentialing, compliance, IT—with automated reminders and real-time dashboards keeping everything on track.

The result is a more streamlined onboarding experience that improves accountability, reduces manual effort, and helps providers start delivering care sooner.



Ensure regulatory-ready onboarding

Collect key documents with forms and use AI-generated labels to monitor compliance milestones.

Standardize onboarding from day one

Create templates with onboarding requirements to ensure every provider follows the same plan, is assigned the same training tasks, and completes credentialing and access steps consistently.

Accelerate onboarding with automation

Use AI Studio to build a workflow that eliminates manual work by automatically assigning tasks to HR, compliance, and operations when a new provider workflow begins.

Monitor onboarding timelines in real time

Use dashboards and AI-generated summaries to track each provider's status, flag delays, and keep teams aligned on what's complete and what's still in progress.

Stay informed with smart updates

Use AI-powered Smart Status updates to understand what's on track, what needs attention, and how onboarding timelines impact care readiness.

Why it matters for healthcare

Faster onboarding means faster access to care. A coordinated, consistent process helps healthcare organizations reduce delays, improve patient outcomes, and stay compliant.

> Asana has been a game changer for our collaboration across departments. Whether we're launching new hiring campaigns, managing onboarding workflows, or aligning on program delivery timelines, Asana keeps everyone on the same page. It's increased our transparency, reduced delays, and made it easier to track real-time progress across a fully remote team.

Aarum Hurse,
Associate Director of People & Operations,
IMPaCT Care

Bringing consistency to strategic care initiatives

How work management can help

- Standardize care initiatives with reusable templates to ensure consistency across departments, facilities, and regions
- Assign clear owners, track milestones, and maintain accountability across teams and functions
- Automate recurring tasks and handoffs to reduce administrative overhead and support compliance
- Centralize updates, status tracking, and reporting to give stakeholders real-time visibility into strategic care initiatives

Launching strategic care initiatives, like Accountable Care Organization (ACO) programs or population health initiatives, is essential to improving outcomes, advancing equity, and delivering measurable impact across communities.

But consistency is crucial. Without a repeatable approach, rollouts can vary across teams and locations, introducing quality gaps and increasing compliance risks.

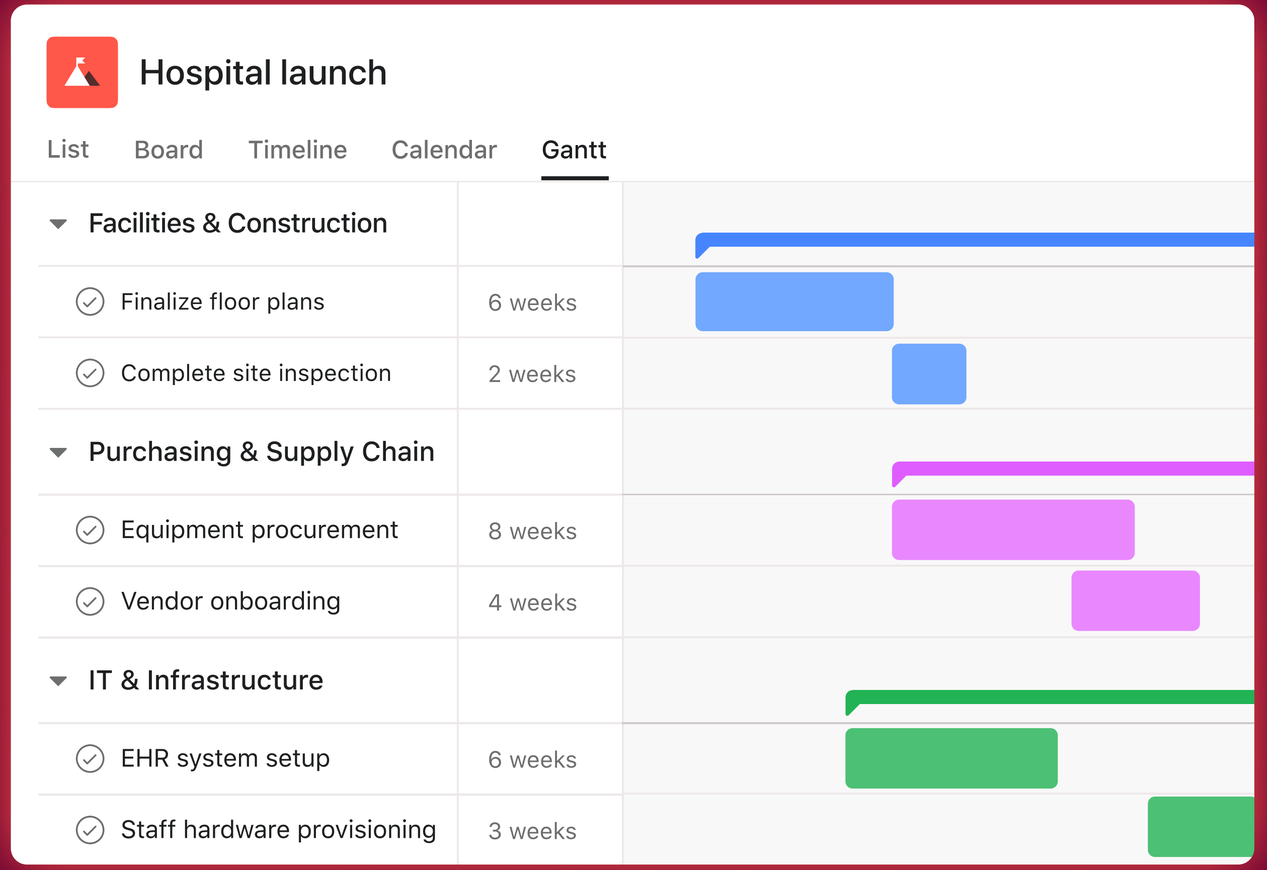
To deliver results at scale, healthcare organizations need structure. That means turning every strategic initiative into a standardized workflow with clear roles, defined steps, and built-in checkpoints, so strong programs can be executed consistently and expanded with confidence.

Work management in action

Coordinating a hospital launch with repeatable workflows

To expand access to care in an underserved area, a multi-hospital health system used Asana to coordinate the launch of a new hospital, from early planning through execution.

Each supporting team, from IT to purchasing to construction, collaborated within their own portfolio, using status updates and timelines to keep work on track. With key stakeholders aligned and risks surfaced early, the team was able to move quickly and create a repeatable framework for future expansion, supporting broader goals around access and equity.



Standardize launch workflows

Use projects to organize every step of the launch, and templates to ensure every launch follows the same plan. Create a consistent framework that scales, so future launches follow the same structure.

Automate key handoffs between support teams

Trigger assignments for tasks like purchasing, construction, and IT automatically when projects kick off. Use rules to route tasks effectively and reduce administrative overhead.

Monitor rollout timelines in real time

Use dashboards to give stakeholders a clear view of launch progress, including tracking milestones, proactively identifying potential blockers, and keeping aligned across teams and timelines.

Stay aligned with smart updates

Use AI-powered Smart Status updates to keep stakeholders informed without manual effort.

Coordinate complex launches with AI-powered workflows

Use AI Studio to create Smart Workflows that guide teams through every phase of a launch, like routing intake forms and assigning tasks across departments, so work stays organized and on track.

Why it matters for healthcare

With a standardized rollout process, healthcare organizations can improve consistency, maintain compliance, and scale strategic care initiatives with confidence.

> Asana has significantly enhanced how eHealth Africa aligns strategies and executes critical initiatives. The platform's clarity and real-time insights have empowered us to swiftly make informed decisions crucial to our stakeholders, significantly improving our organizational agility, efficiency, and collaboration.

Atef Fawaz,
Executive Director,
eHealth Africa

Aligning around high-stakes healthcare contracts

How work management can help

- Centralize contract milestones, reporting deadlines, and deliverables
- Track execution against key initiatives, quality measures, and contractual obligations
- Align cross-functional teams, like compliance, finance, and operations, around shared timelines
- Surface risks early so teams can adjust before incentives or standing are at risk

Managing healthcare contracts, whether through payer agreements, performance-based models, or regulatory partnerships, requires precision and alignment. From performance benchmarks to reporting timelines, each contract brings its own set of deliverables that must be delivered accurately and on time.

But when teams like finance, compliance, and population health work in silos, it becomes harder to stay aligned, track progress, or flag risks before they escalate. Without a centralized system for managing contract-related work, organizations face delays in reporting, missed financial incentives, and gaps in compliance.

To stay on track, healthcare organizations need a structured, real-time way to coordinate across departments—ensuring every contract deliverable is clear, assigned, and accounted for.

Coordinate every requirement in one place

Use projects to manage the full lifecycle of a contract, including deliverables like quality submissions, audit documentation, and contract milestones.

Organize work by program, status, or owner

Apply custom fields to tag work by contract type, reporting status, or department, making it easy to filter and monitor deliverables.

Track contract goals in real time

Build dashboards to give stakeholders visibility into progress and risks before they affect outcomes, reimbursement, or compliance.

Control access to sensitive work

Use permissions to give the right teams visibility, without exposing payer-specific information or sensitive data.

Why it matters for healthcare

Contract performance is central to financial, regulatory, and reputational outcomes. With structured systems in place, healthcare organizations can meet complex requirements with confidence, stay audit-ready, and protect earned incentives.

Staying audit-ready without the administrative burden

How work management can help

- Centralize compliance requirements—like reporting deadlines, documentation, and quality benchmarks—in one place
- Use automations to assign recurring compliance tasks, trigger reminders, and escalate at-risk items
- Gain real-time visibility into compliance status and audit readiness
- Protect access to sensitive work with built-in permission controls

Compliance isn’t just a regulatory box to check—it’s a critical part of delivering safe, high-quality care. It keeps funding flowing, risk in check, and quality metrics on track. Yet for many teams, staying audit-ready still relies on manual tracking and scattered documentation, making it harder to stay proactive and prepared.

When reporting deadlines, documentation, and audit trails are spread across disconnected tools, it’s easy to lose time or lose sight of what’s needed. And in a complex regulatory environment, manual tracking just can’t keep up.

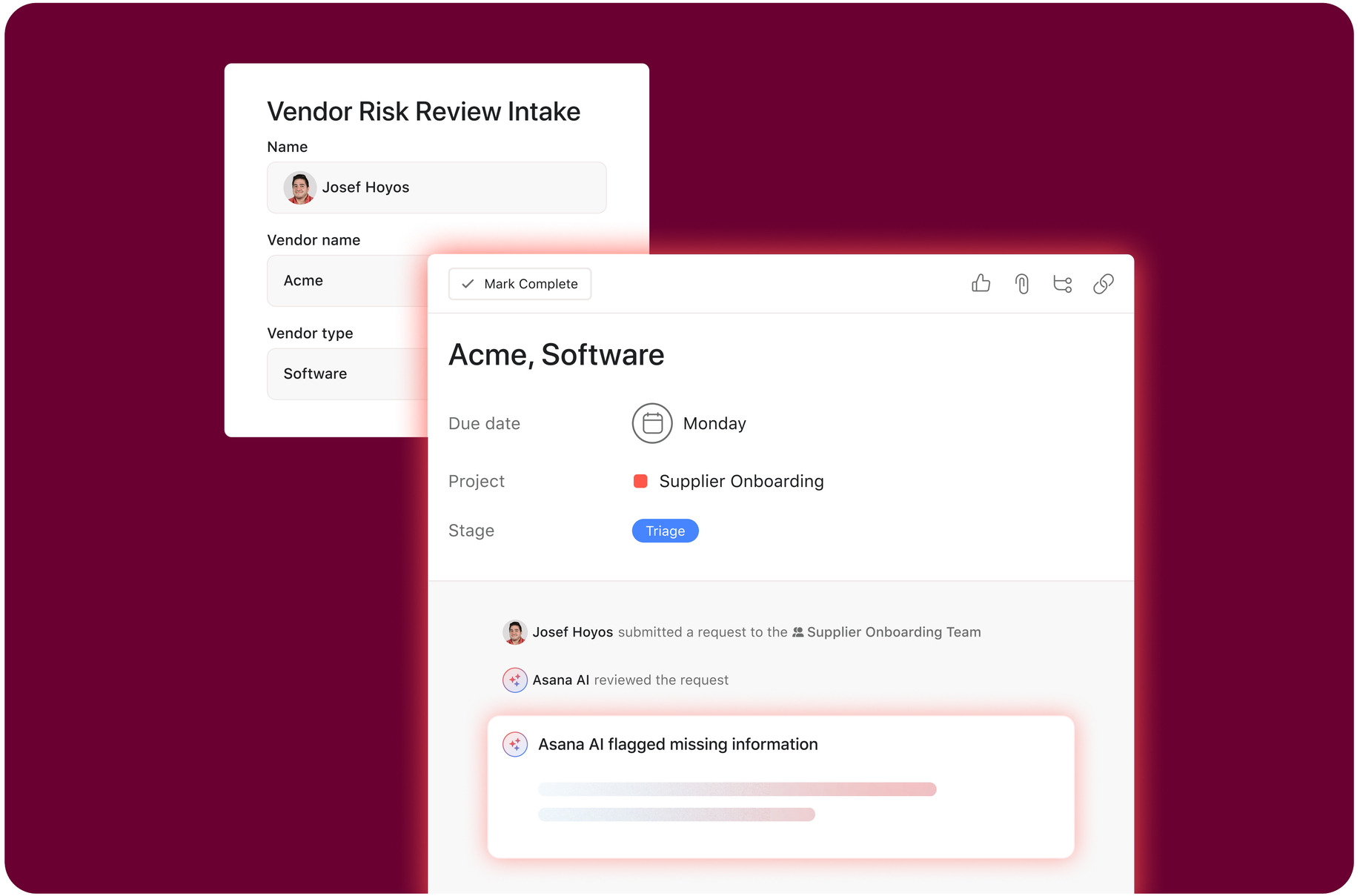
To stay ahead, healthcare teams need systems that bring structure to compliance, making it easier to stay organized, proactive, and ready whenever an audit comes around.

Work management in action

Simplifying compliance with automated workflows

Vendor risk reviews are often manual, time-consuming, and difficult to audit. To simplify the process, healthcare teams can use AI-powered workflows in Asana to manage intake, surface risks, and automate handoffs between cross-functional teams.

With a Smart Workflow built in AI Studio, vendor intake requests are triaged automatically. The system flags missing documentation, generates reviewer briefs, and recommends approvers based on vendor type and risk level. Reviewers from teams like legal, finance, and security are looped in with clear tasks and context—and every step is logged in one place for easy access during audits.



Track and organize every review in one place

Use projects to centralize vendor risk reviews and other compliance tasks, ensuring every requirement is documented, traceable, and accessible when audit time comes.

Triage intake requests efficiently

Use forms to standardize vendor submissions and collect key details upfront, like service type, risk category, and documentation status, ensuring no information is missed at intake.

Capture and surface critical review details

Apply custom fields to log vendor types, risk levels, submission status, and ownership, making it easy to filter, prioritize, and report on open items.

Automate routine work and reduce risk

Use rules to assign reviewers, trigger reminders, and route tasks based on risk level or submission status, cutting down on manual effort and keeping everything moving.

Stay aligned on key compliance checkpoints

Use milestones to highlight important deadlines, like submission dates, internal review points, and final approvals, so cross-functional teams stay focused and deliver on time.

Why it matters for healthcare

In today's complex regulatory environment, compliance is essential for minimizing risk, securing reimbursement, and maintaining operational excellence. Structured systems help teams reduce manual work, stay ahead of reporting deadlines, and remain audit-ready at all times.

Control access to sensitive reviews

With permission controls, give the right teams visibility into tasks without exposing sensitive information.

Streamline compliance reviews with AI Studio

Use AI Studio to triage intake forms, flag missing information, generate reviewer briefs, and recommend routing, creating an audit-ready process that reduces manual work and runs efficiently behind the scenes.

Operational excellence is the path forward



In today’s complex healthcare landscape, the gap between strategy and action isn’t sustainable. The organizations best positioned to succeed won’t just set bold goals; they’ll build the infrastructure to deliver on them.

Organizations that connect strategy to daily work, align cross-functional teams, and embed compliance into everyday operations will be better equipped to adapt, scale, and drive lasting impact—for patients, providers, and the healthcare system as a whole.

Bridge the gap between strategy and action

See how Asana helps healthcare teams connect plans to action

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