

Don't Get Stuck With the Wrong Tool

An Operations Buyer's Guide

Zipline



Introduction

Delivering a consistent patient experience is essential for teams managing operations across practice groups, office locations, and regions.

For many operations leaders, getting the right information to the right people at the right time is one of the hardest parts of the job. And once that information passes through, accountability is a challenge to track from task to completion. In Zipline's [*State of Retail Communications and Execution*](#) report, we found that just **36% of teams** used a purpose-built task and communications platform to manage operations. And, of those who did use a platform, **a 26% adoption gap** existed between corporate leaders and on-the-ground leaders.



36% of teams used a purpose-built task and communications platform to manage operations.



26% adoption gap existed between corporate leaders and on-the-ground leaders using a platform.



If you're still relying on email chains, spreadsheets, or other messy tools, you already know the cost. This Operations Buyer's Guide is for those ready to invest in an operations platform built for the way your organization actually works. Our questions and scorecard will help you land on a tool that keeps teams at every level moving forward and in the same direction.

20 Questions to ask during your operations software evaluation process

The fundamentals

1 What are the benefits of operations software?

The benefits are wide-ranging, from effective **task management** to **stronger reporting**. When execution can be tracked and measured, teams stay aligned and small inefficiencies get caught before they compound. For many care groups, though, the journey to better operations starts with a simple need: **to keep communications in one place**.

If that's your primary motivation, **look for a platform that offers** all of the following:

- Easy adoption for everyone from corporate to office teams
- Enterprise-level capabilities
- Fast, efficient communication
- Scalability that grows with your organization
- Top-of-the-line security
- Multi-language support
- Integrations to ecosystem tools
- Personalized experiences



2 What are the downsides to adopting a new platform?

Bringing in a new tool is a big move, but the right one makes the transition worth it. Before committing, make sure the platform integrates cleanly with the **tools your teams already use**—from your WFM to LMS—so you're building on your existing tech stack, not fighting it. A little planning here goes a long way.

Same goes for exit costs. Factor those in early for each option you're evaluating—no surprises down the road.

3 How do you evaluate pricing?

Look for an operations platform with a **pricing model** that's transparent, flexible, and can grow with your business.

Some scale pricing based on the number of offices or users. Others offer a flat structure, or price by feature so you only pay for what you need. In multi-location care, higher staff turnover can make it harder to predict usage. There's no one-size-fits-all answer—what matters is finding a model that's aligned with how your org actually operates.

4 How do you evaluate an operations platform vendor?

There are many SaaS communication tools out there, but not all of them are built with multi-location care organizations in mind. Generic tools make you bend your process to fit the product. But if you're taking the time to invest in a new tool, you probably want something that fits your workflow like a glove.

Before you commit, ask the hard questions: Does this vendor understand the complexity of communicating across geographies, languages, and time zones? Do they know what it actually takes to get office teams to complete tasks or manage multiple locations, each with their own operational nuance?

Another consideration is whether the platform has the tools and capabilities you need *today*. Many teams will choose a vendor because the UI is polished and a sales rep has promised a feature that is on the roadmap or can be customized within your team instance. This isn't a red flag, but if you need a feature from day one, you're better off choosing a platform that delivers it from day zero.



Platform fit: Capabilities that matter most

5 Does the platform integrate with the tools you already use?

Robust **tool integrations** ensure that you're not introducing friction into your workflows down the road. For example, incompatible tools can duplicate or slow down information and even make your data unreliable. When your data is the foundation of your business decisions, your tools need to integrate seamlessly.

In your evaluation, be aware of whether your operations platform integrates with your practice management system, scheduling software, business intelligence, and patient experience tools.

6

Can the platform adapt to your existing org structure? And can employees at corporate, management, and care team member levels all use the platform with a personalized experience?

Multi-location care is complex. You've got many layers—corporate, regional leads, office managers, clinical leads, and care team members—and the right message needs to reach the right level without noise getting in the way. A platform that can't mirror or support your org structure will create workarounds, not solutions.

Ask vendors how their platform handles role-based access and communication targeting across different levels of your organization. The best tools are built to flex around your hierarchy, not force you to reorganize around theirs. Your platform of choice should also have tools and features that are relevant for teams across role levels. A tool that only corporate can use means that the benefits aren't reaching day-to-day operations.

7

Can the platform support day-to-day care team workflows?

Look for a platform designed around the rapid-fire demands of in-office work: simple interfaces, mobile-first design, and task formats that reflect how your teams actually operate. Skip the waterfall charts and ticket queues this time.

The ability to pass the baton to other team members is also critical. Ask how work can be handed off from employee to employee, in-context and with clarity around ownership and accountability. A level of ease in operational handover ensures that the platform isn't just facilitating a series of tasks, but rather keeping work moving forward with little friction.

8

Can you send targeted messages to specific offices and audiences?

Not every message is meant for every office location. You should have the capability to segment your audiences—by location, time zone, office type, practice, regional manager, and more. Some groups even maintain distribution lists for offices subject to specific clinical or regulatory requirements.

If you run pilots or tests with select office groups, ask about custom or ad-hoc distribution lists: how easy are they to create, and does it cost extra?



9 Can I upload office policies, clinical protocols, and operational resources into a knowledge base?

Is it easy to find the answers to your questions? Access to office policies, SOPs, and brand resources within the platform creates a single source of truth and point of reference for both corporate and care team staff.

A robust operations platform should make rules and guidelines searchable and easy to reference from a centralized location. Quick and instant Information retrieval puts care team staff in a better position to deliver higher quality care experiences to patients without leaving the room or consulting senior members of staff. A managed knowledge base will also give corporate and office staff up-to-date and easily-retrievable reference points as they're managing complexity across office locations.

Communications and execution

10 Can messages be scheduled according to workflow and communications needs?

You want control over when and how messages go out. Some brands send communications throughout the day; others batch and send all at once. Only move forward with a vendor that lets you schedule messages in a way that fits your workflow—and supports, rather than disrupts, office productivity.

11 Can you track message opens and task completion?

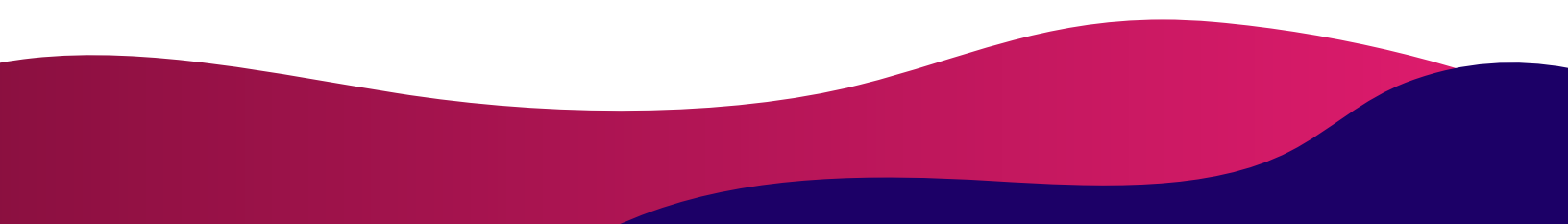
This one's non-negotiable. One of the biggest reasons organizations struggle with execution is that messages disappear into a black hole, taking accountability with it.

The right operations software gives you complete visibility into each message's journey: who opened it, who didn't, and whether the task was completed. But the best platforms don't just broadcast—they **close the loop**. When insights from individual office locations flow back to corporate in real time, leaders can see what's landing, catch gaps early, and adjust fast. That two-way flow is what turns visibility into actual accountability.

12 Is the platform mobile-friendly?

Care teams aren't just sitting at their desks. Mobile-friendly platforms should also ensure access to information and office policy without disrupting the patient experience or flow of work. Prioritize an operations platform that allows care team members to be able to check company and office policy efficiently on a mobile device without needing to leave the patient alone to ask a supervisor or step away from the floor.

Even if you don't currently provide mobile devices or have a BYOD policy, choose a mobile-friendly platform now, so the technology is ready if and when your policies evolve.





IT, security, and rollout

13 Is the product secure and does it meet your internal security standards and protocols?

Data security isn't optional. Make sure any vendor you're considering is fully compliant with the [latest security and data privacy standards](#) and can prove it. This should include industry, compliance, and internal security and privacy standards like HIPAA and GDPR.

Ask how often they require password updates, how quickly they deploy security patches, and what their track record looks like when it comes to leaks, sensitive information handling, and storage. SaaS security should be a top priority for any vendor you work with.

14 How are software updates handled?

Technology moves fast, and your platform needs to keep up. Check the vendor's changelog to understand how frequently they release updates and how they communicate those changes to customers.

Too few updates is a bit of a red flag. But so is a vendor that pushes changes without warning. The last thing you need is a surprise update throwing a wrench in your seasonal promotion launch communications.

15 What does your IT team think?

Loop them in early. Narrow your list to two or three top choices first, then hand it off. (Trust us, it'll save everyone time.)

Your IT team will want to know where your data lives, how it's structured, and whether the platform supports regulatory compliance. It's not paranoia—[data breaches can cost millions](#), and the stakes keep going up. The more prepared you are going in, the faster this process moves.

16 Will the vendor support rollout and training?

Change management is hard. Even if it makes employees' jobs easier, you may meet resistance at first.

Ask any prospective vendor how they support rollout and training—before, during, and after go-live. The [best vendors act as partners](#): learning your current processes, helping communicate the change, and training your team at every level. And don't just take their word for it—ask for proof. Metrics like NPS scores and customer retention rates tell you how well a vendor actually delivers on that promise.

AI/Intelligence capabilities

17 What are the AI capabilities of this platform and how do they support operations?

AI adoption is a priority for organizations that want to move faster through intelligence and automation.

If AI capabilities are top of mind for your business be sure you're finding out whether the platform you're evaluating has relevant features that actually support operations. You don't want a platform with features that feel like they've been added on as an afterthought.

Assess whether the AI features increase your team's ability to move faster with accurate data, support care team workflows, surface clinical protocols and office policy from a database into a chat interface, and summarize and streamline crucial communication.

Don't just look for the generic AI label or feature. Test it against how your teams actually work and look for purpose-built features that can learn your brand voice and policies. This is how you can use AI capabilities to create an actual competitive advantage for your business.



18 Can the platform's AI be trained on our company policies?

For AI to be effective in your operational workflow, the ability to train the platform on company policies and guidelines is essential. This capability puts the information being processed into context, ensuring that guidance, metrics, summaries, and communications are supported by a layer of organizational truths and guardrails.

19 How does the platform manage communications complexity from multiple locations?

Communication complexity adds up when messages can't be managed, directed, or filtered for relevance. The most effective operations platforms consolidate tooling, so information is up-to-date and centralized instead of dispersed across apps and spreadsheets.

They also allow leaders to tailor communications and their frequency by office location, role, and region as needed. Look for a platform that doesn't assume uniformity across communication requirements. And future proof your operations by considering whether the features scale as your operations and locations scale too.

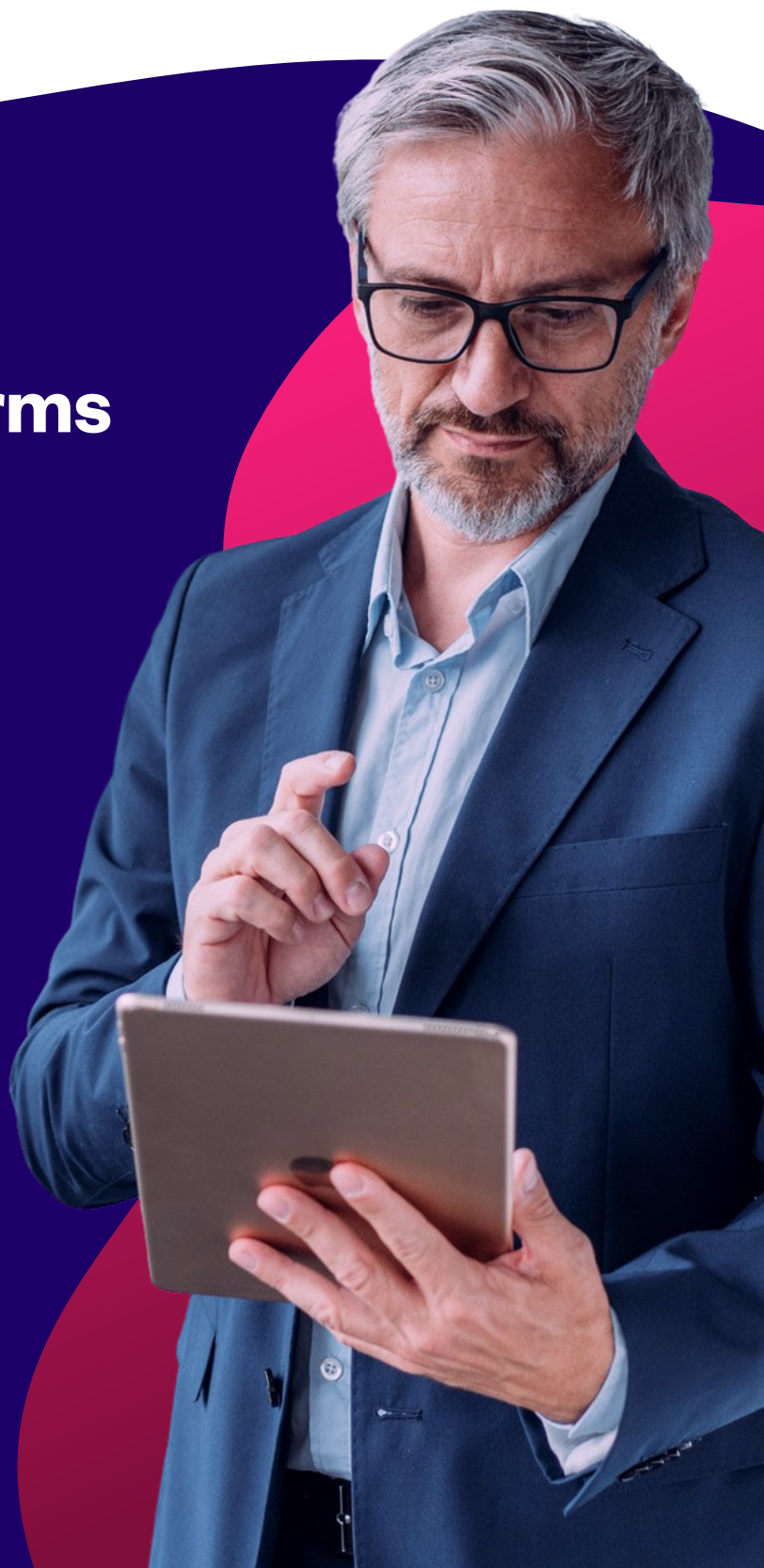
20 **How do we measure the ROI of the platform's AI, and can you show the specific operational metrics it moves?**

Measuring the ROI of AI systems is similar to measuring the ROI of any tool or workflow. First, decide what operational metrics you're most interested in improving and determine whether they are influenced by the platform's AI capabilities. If your team did not have an AI-powered tool before and now does, watch what direction metrics like task completion, NPS, patient satisfaction, and online ratings move before and after the platform implementation.

Up next: Seeing how platforms measure up

Now that you know what questions you should be asking during evaluation, you'll need a way to compare between the features you need and the vendors you're in conversation with.

Use our operations scorecard to see how the vendors you're evaluating stack up.



An Operations Buyer's Guide Scorecard



This scorecard serves as a framework to evaluate and compare different operations platforms. Here's how it works:

Categorized Requirements:

The criteria are grouped into pillars such as Platform fit, Communication and execution, and AI to ensure you evaluate vendors across all critical aspects of your operations.

Defining Success

The "What good looks like" column defines the benchmark for each feature, helping you clarify exactly what functionality is required.

Standardized Scoring

For each criteria, circle how the vendor performs so you can keep track of how each meets your requirements.



(1 point):

The vendor fully meets the requirement.



(0.5 points):

The vendor partially meets the requirement.



(0 points):

The vendor does not meet the requirement.

Vendor Comparison

By calculating the total points across these categories, you can generate a final score for each vendor (Vendor A, B, C), creating an objective basis for your final selection.

Criteria: Platform fit

This section evaluates whether the platform is built for the realities of modern multi-location care. It focuses on mobile accessibility, integration with your current tech stack, and usability across every level of your organization, from corporate to the store floor.

What good looks like	Vendor A	Vendor B	Vendor C
The platform is mobile friendly	  	  	  
The platform includes a central knowledge base for SOPs, policies, and resources, built as rich pages (text, images, and video together) not just uploaded files	  	  	  
The platform integrates with your existing tech stack	  	  	  
The platform includes relevant features for corporate, office leaders, and care team staff	  	  	  

Criteria: Communication and execution

These metrics assess how well the platform manages daily operations and team alignment. Key considerations include the ability to send targeted communications, track task completion, and reduce information overload for your teams.

What good looks like	Vendor A	Vendor B	Vendor C
With the platform, users can send targeted messages to specific teams or offices	  	  	  
With the platform, users can track completed tasks	  	  	  
With the platform, users can track opened messages	  	  	  
The platform's communications features help to meaningfully reduce overwhelm (smart summaries, scheduling and cadence control, etc.)	  	  	  
The whole team shares one view of the office location's day, and tasks can be handed off between people or resumed after an interruption	  	  	  

Criteria: AI and operational intelligence

This category measures the platform’s capacity to leverage artificial intelligence to drive efficiency. It evaluates the ability to train the system on company policies and empower care team employees with instant, accurate answers.

What good looks like	Vendor A	Vendor B	Vendor C
The platform’s AI capabilities support office operations	✓ ! ✗	✓ ! ✗	✓ ! ✗
The platform’s purpose-built AI can be trained on your company’s policies, data, and workflows	✓ ! ✗	✓ ! ✗	✓ ! ✗
Care team employees can use the platform to look up office policies, comms, and tasks from the floor	✓ ! ✗	✓ ! ✗	✓ ! ✗
AI recommendations draw on operational behavior inside the platform (such as task completion, readership, training, etc.)	✓ ! ✗	✓ ! ✗	✓ ! ✗

Criteria: IT, security, and rollout

This section addresses the technical and operational requirements for a successful implementation. It ensures the vendor meets your internal security standards, manages updates without disruption, and provides the training support necessary for a smooth launch.

What good looks like	Vendor A	Vendor B	Vendor C
The platform meets your internal security requirements	✓ ! ✗	✓ ! ✗	✓ ! ✗
Software updates are transparent and non-disruptive	✓ ! ✗	✓ ! ✗	✓ ! ✗
The vendor provides hands on rollout and training support	✓ ! ✗	✓ ! ✗	✓ ! ✗

Criteria: Evaluation

These final criteria help you quantify the "human" and financial side of your decision. It ensures you have verified the platform's current feature set through demos and confirmed that the pricing aligns with your budget.

What good looks like	Vendor A	Vendor B	Vendor C
Pricing is transparent and in budget	✓ ! ✗	✓ ! ✗	✓ ! ✗
The features that are most important to me currently exist in the product	✓ ! ✗	✓ ! ✗	✓ ! ✗
The demo addressed my specific use cases	✓ ! ✗	✓ ! ✗	✓ ! ✗

FINAL SCORE

Calculate the total points across all categories to generate a final score for each vendor.

How they stack up	Vendor A	Vendor B	Vendor C
To determine the final ranking, add the total points awarded for each vendor across all criteria categories. Use this total to identify the platform that best aligns with your organizational needs.	[SCORE]	[SCORE]	[SCORE]

Notes: