
Initiatives User Guide

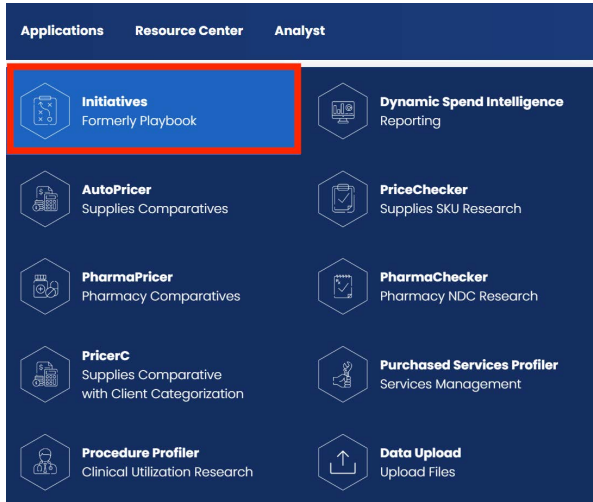
Purpose: A project management framework designed to capture, centralize, and monitor non-labor cost-reduction strategies.

Table of Contents:

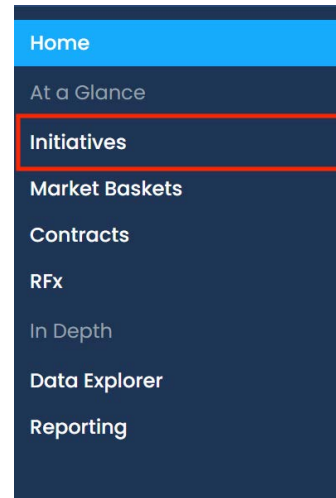
- [Initiatives Landing Page & Definitions](#) - Page 1
- [Initiatives Structuring](#) - Page 4
- [How to Identify a Savings Opportunity & Navigate the Initiative Card](#) - Page 5
- [How to Start an Initiative](#) – Page 7
 - [Custom Initiative](#) – Page 8
 - [Product Initiative](#)- Page 8
 - [Conversion Initiative](#) – Page 9
 - [What If Analysis Initiative](#) - Page 9
- [How to Snooze an Initiative](#) – Page 10
- [How to Close an Initiative](#) – Page 12
- [How to Queue an Initiative](#) – Page 12
- [How to Archive an Initiative](#) – Page 13
- [How to Create and Edit a Strategic View](#) – Page 14
- [Initiatives Types](#) – Page 17

Initiatives Landing Page & Definitions

The **Initiatives landing page** is the default page for all clients unless adjusted by management within the organization. If the Initiatives landing page is not set to default, then navigate to Applications and Initiatives/.



or











Initiatives initiatives/projects are listed by the Curvo category/manufacturer or custom client category/manufacturer and are housed in seven different tabs that are listed below.










Dashboard: This is a summary page for projected savings trends from year to year or by the organization’s fiscal year.

1. **Strategic Views:** This tab contains custom views/groupings that contain multiple initiatives that have been set up or requested by the team. These views/groupings are also visible as filter options within the reports.
2. **Active:** This tab contains initiatives/projects that have been set to active by the team and are currently in progress.
3. **Suggested:** This tab contains initiatives/projects that have been suggested by the Curvo client management team.
4. **Snoozed:** This tab contains initiatives/projects that have been put on hold by the team for a specific amount of time and will re-appear under the suggested tab when the snooze date has ended. The default snooze durations are 30, 60, 90, or 180 days. The snooze date can also be updated and customized to a specific date after the initiative has been snoozed.
5. **Closed:** This tab contains initiatives/projects that were once active and have now been resolved and closed by the team to either track savings/utilization or not. Once an initiative has been closed it will then move to the snoozed tab for the default period of 60 days to alleviate duplication of closed initiatives/projects. This snooze duration can be changed to meet the organization’s specific needs.
6. **Queued:** This tab contains initiatives/projects that have been suggested by Curvo analytics using the organization’s specific priority scoring settings as potential savings opportunities that are divided into five key performance indicators (KPI’s). Market Savings, Price Increase, Qty Increase, Parity, & New Product Introductions.
7. **All:** This tab contains **ALL** the initiatives/projects within the organization that are related to non-labor expense. This does not include purchased services or capital equipment.

 **Initiatives**
formerly Playbook 

-  Dashboard
-  Strategic Views
-  Active 10
-  Suggested 10

-  Snoozed 0
-  Closed 16
-  Queued
-  All

| ⋮ | Initiative Name | ⋮ | Historical Spend | ⋮ |
|--|---|---|------------------|---|
|  |  Stretchers, Stryker, 1551 | | \$91,741 | |
|  |  Spine, Globus Medical, 755 | | \$1,067,048 | |
| |  Conversion Opportunity, ERBE | | \$253,828 | |
|  |  Endovascular Aneurysm Repair, Aortic (EVAR, TEVAR), Terumo, 496 | | \$279,432 | |
|  |  Implants - Spine, Globus Medical, 748 | | \$1,894,817 | |

There are additional filter options for each tab that are located on the oil filter icon. *Example: Supplies and Pharmacy are under Class.* Additionally, on all tabs except for Suggested there is a search box to search for a specific initiative by category or manufacturer name.

Filters

Assigned To

Watch list

Class

The Filters Below Apply to Client Categorization Only

Client Classification

Client Department

LOC

Locally Eligible

Group Tier Eligible

Tiered

Type

Sacred Heart Health System CC

All Initiatives

| Historical Spend | Price Change | Qty Change | NPI Spend | Optimal Savings | Parity Opportunity | Total |
|------------------|--------------|--------------|-------------|-----------------|--------------------|-------|
| \$1,358,044,589 | \$6,227,181 | \$80,853,831 | \$4,432,110 | \$26,399,324 | \$2,897,630 | 10007 |

Priority Score | Market Opportunity | Cost Drivers | Parity

| Initiative Name | Historical Spend | Market Share | Priority Score | Price Increase (\$) | QTY Change (\$) | NPI Spend | Optimal Savings (\$) | Parity Opportunity L. | Strategic view |
|------------------------|------------------|--------------|----------------|---------------------|-----------------|-----------|----------------------|-----------------------|----------------|
| Antibody, Meck, US3408 | \$53,624,218 | 0.09% | 10 | \$1,552,259 | \$4,819,298 | \$0 | \$603 | \$0 | |

Custom Initiatives can also be set or requested by the team to track a specific group of products, one-time savings amounts, conversion projects, or analytics for potential conversions.

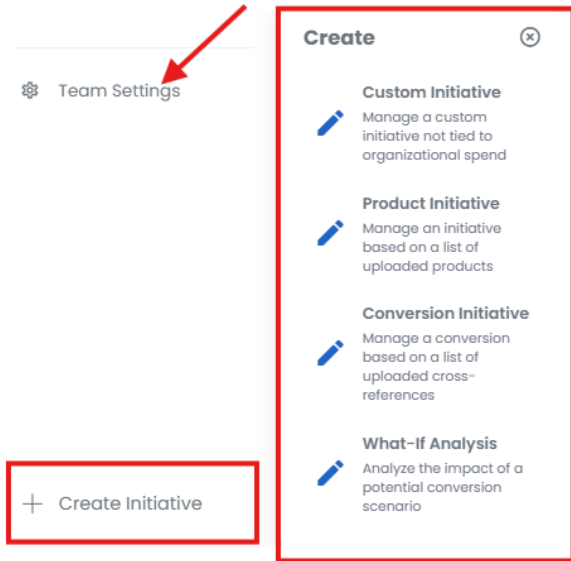
The team settings are where adjustments can be made for KPI priority scoring, initiative/project durations, fiscal years, & custom ImpactTracker report dates. Please note that these changes take the weekend refresh to populate.

Custom Initiatives: Created to track one-time savings amounts that are not tied to products or contracts. This would be ideal for purchased services, rebate savings, placement agreements, IT, Capital, or lab.

Product Initiatives: Created to track a custom group of products outside of the Curvo category/manufacturer or custom client category schema.

Conversion Initiatives: Created to track products that are converted from one manufacturer to a different manufacturer.

What-If Analysis: Created to analyze the impact of a potential conversion project.



Initiatives Structuring

Initiatives uses the Curvo enriched categorization schema to create initiatives

| Search... | | | | | | | | | | |
|-----------------------------------|-----------------|-------------------|------------------------|-------------|------------------|---------------|-------------------|----------------|--|--|
| Initiative Name | Initiative Type | Initiative Status | Days Since Last Update | Assigned To | Historical Spend | Target Date ↑ | Target Savings \$ | Strategic View | | |
| Ortho - Trauma, DePuy Synthes-J&J | Multiple | In Progress | 308 | | \$2,806,799 | 07/31/2024 | \$350,000 | | | |

1 - 1 of 1 items

How to Identify a Savings Opportunity & Navigate the Initiative Card

To identify a savings opportunity, utilize the **Queued** tab. There are three different tabs located at the top for **Market Opportunity**, **Cost Drivers**, and **Parity**. For each tab simply click on any column to ascend or descend on (\$) or (%) to show the highest or lowest opportunity at the top based upon the preference of spend or percentage.

| Initiative Name | Simulated Spend | Market Share | Priority Score | Optimal Savings (\$) | Spend Savings (\$) | Has Rebate | Strategic View |
|--|-----------------|--------------|----------------|----------------------|--------------------|------------|----------------|
| Contract Gap, Abbott Vascular | \$5,765,949 | | 2 | \$621,458 | \$468,475 | ✗ | |
| Implants - Spine, Globus Medical, 748 | \$1,521,958 | | 5 | \$366,506 | \$70,841 | ✗ | |
| Conversion Opportunity, Smith & Nephew | \$1,672,394 | | 1 | \$241,901 | \$75,488 | ✗ | |

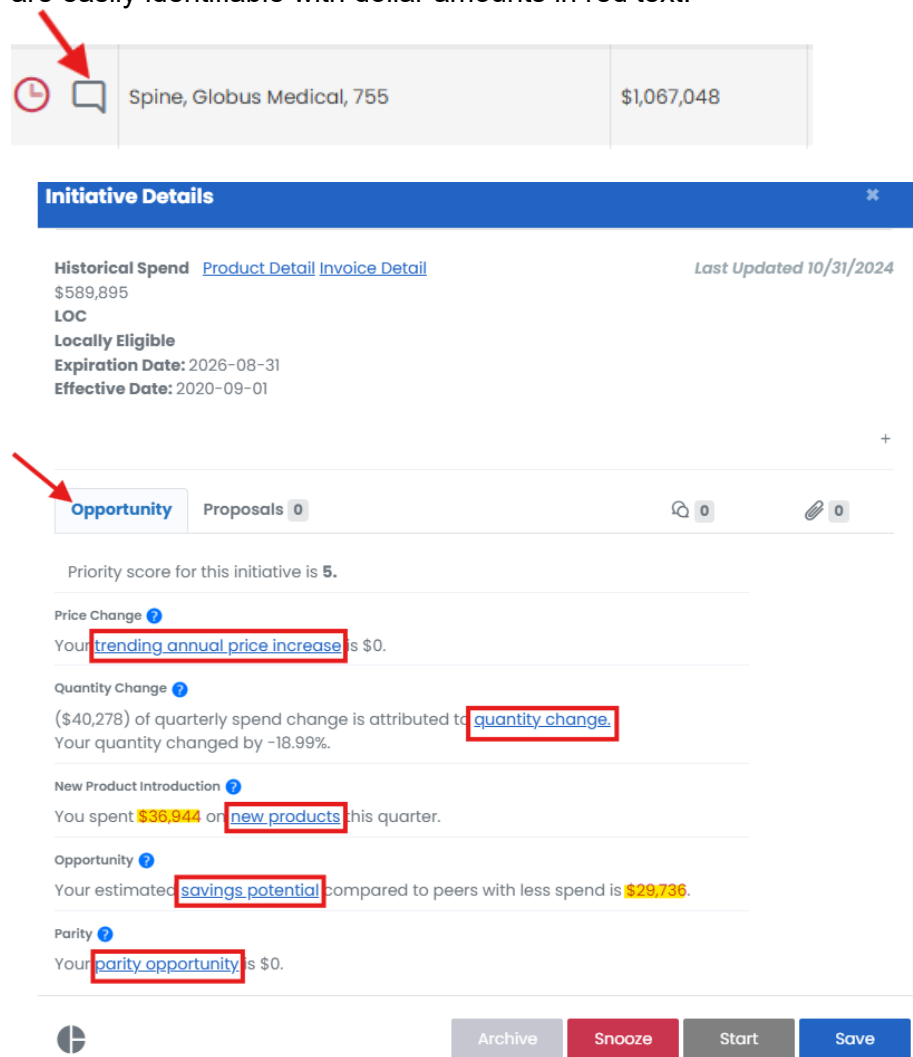
Market Opportunity: Trending annual savings calculated by comparing the organization's pricing to lower Curvo peer pricing for the same product mix. *i.e.* – **Optimal Savings** is based upon the lowest price in the market amongst Curvo peers and **MS/Spend** (market share) or **Spend** is based upon lower pricing compared to Curvo peers with less spend and/or market share.

Cost Drivers:

- **Price Increase:** Trending annual savings calculated by comparing the most recent price paid against the previous price paid by facility in a 3-month period.
- **Qty Change:** Calculates quarter-over-quarter quantity changes by spend and percentage.
- **New Product Introductions:** Spend on products the organization has purchased in the past quarter that have not been purchased the prior year. These calculations are at the group level.

Parity: Trending annual savings calculated by comparing where facilities are paying different pricing for the same products within a 1-month period.

To view the savings details on the initiative card simply click on the text box icon and navigate to the **Opportunity** tab. This tab has five KPI indicators listed with deep links that will take users directly to the reports or AutoPricer information for that opportunity. The savings opportunities are easily identifiable with dollar amounts in red text.



Initiative Details

Historical Spend [Product Detail](#) [Invoice Detail](#) Last Updated 10/31/2024
 \$589,895
 LOC
 Locally Eligible
 Expiration Date: 2026-08-31
 Effective Date: 2020-09-01

Opportunity Proposals 0 0 0

Priority score for this initiative is 5.

Price Change ⓘ
 Your **trending annual price increase** is \$0.

Quantity Change ⓘ
 (\$40,278) of quarterly spend change is attributed to **quantity change**.
 Your quantity changed by -18.99%.

New Product Introduction ⓘ
 You spent **\$36,944** on **new products** this quarter.

Opportunity ⓘ
 Your estimated **savings potential** compared to peers with less spend is **\$29,736**.

Parity ⓘ
 Your **parity opportunity** is \$0.

Archive Snooze Start Save

How to Start an Initiative

Once users have identified an opportunity and confirmed the details it can be moved from the **Queued** tab to the **Active** tab. Simply select the **Start** button and fill out any necessary fields of information. None of these fields are required to start the initiative. Please see **Page 18** for the initiative type definitions.

Opportunity Proposals 0

Priority score for this initiative is 5.

Price Change ⓘ
Your [trending annual price increase](#) is \$19,240.

Quantity Change ⓘ
\$13,382 of quarterly spend change is attributed to [quantity change](#).
Your quantity changed by 16.83%.

New Product Introduction ⓘ
You spent \$6,778 on [new products](#) this quarter.

Opportunity ⓘ
Your estimated [savings potential](#) compared to peers with less spend is \$210,119.

Parity ⓘ

Archive Snooze Start Save

Start Initiative

Advanced Energy - Advanced Bipolar Equipment & Supplies, Medtronic, 12

Historical Spend
\$396,390

Status
▼

Assigned To

Contract Number
12

Notes

Target Savings: This is 46% of your historical spend
\$181,146 Spend: 46% Optimal: 46%

*used to calculate Projected Savings for Active Initiatives

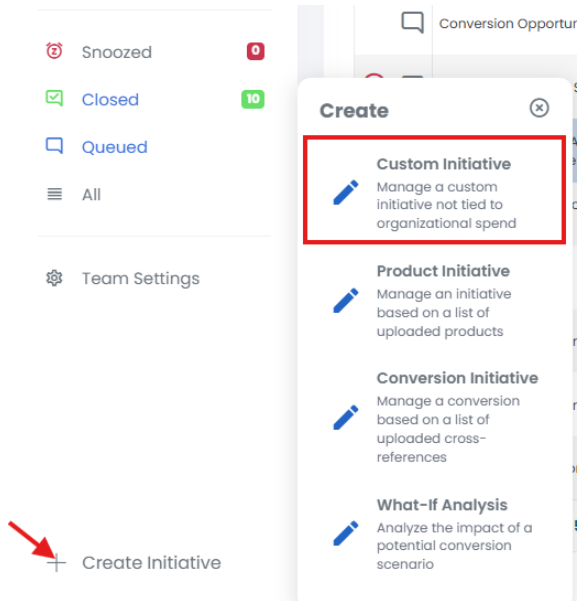
Type
▼

Strategy

Start

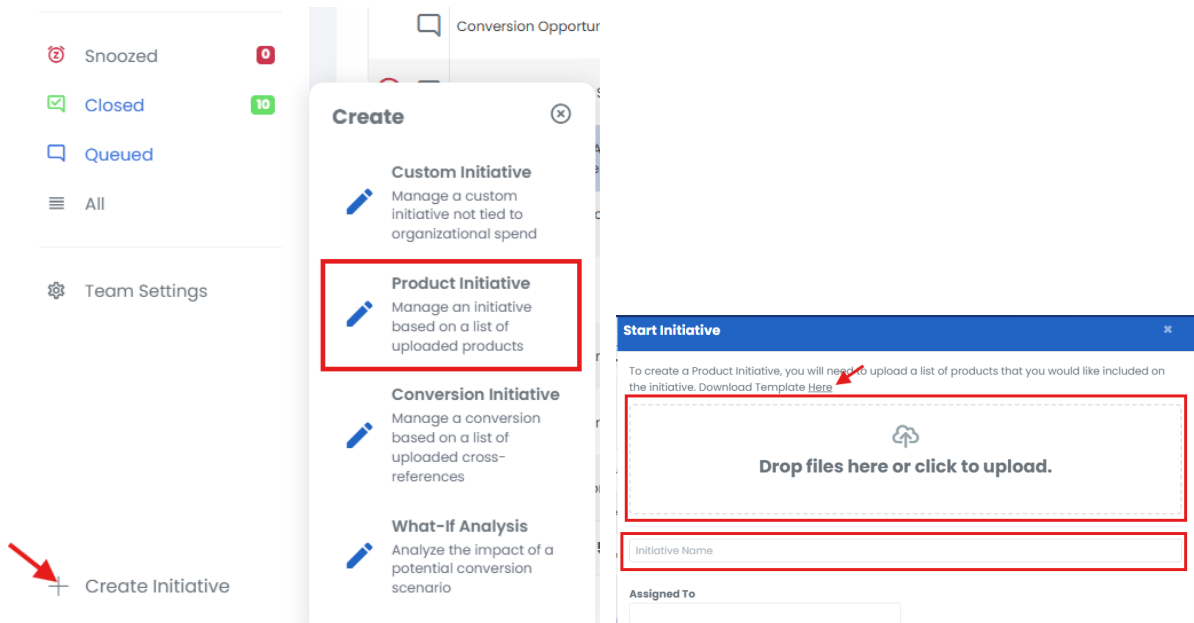
How to Start an Initiative: Custom Initiative

Navigate to **Create Initiative** on the bottom left-hand page and select **Custom Initiative**. Simply fill out any necessary fields of information and select the **Start** button.



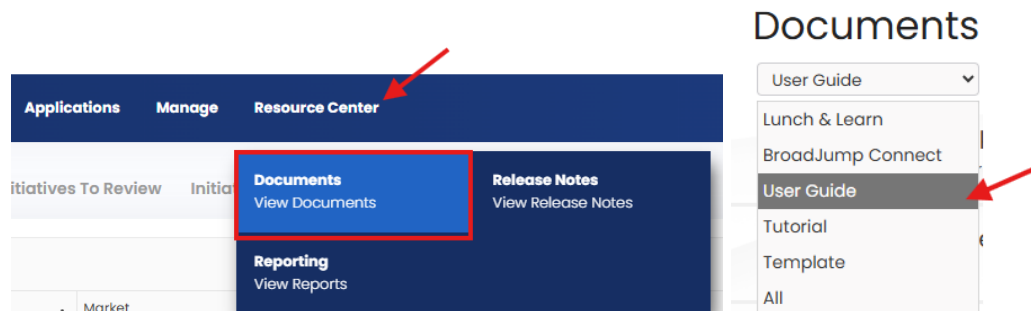
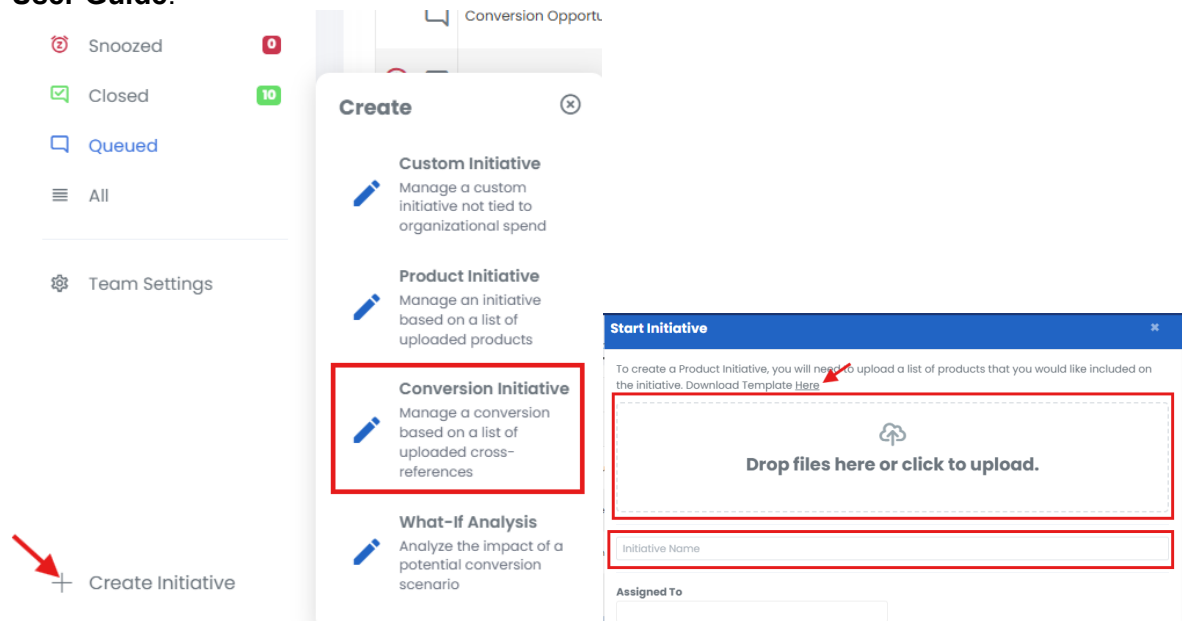
How to Start an Initiative: Product Initiative

Navigate to **Create Initiative** on the bottom left-hand page and select **Product Initiative**. Use the deep link labeled [Here](#) to download the template. Upload the template and fill out any necessary fields of information and select the **Start** button. Necessary fields are Initiative Name.



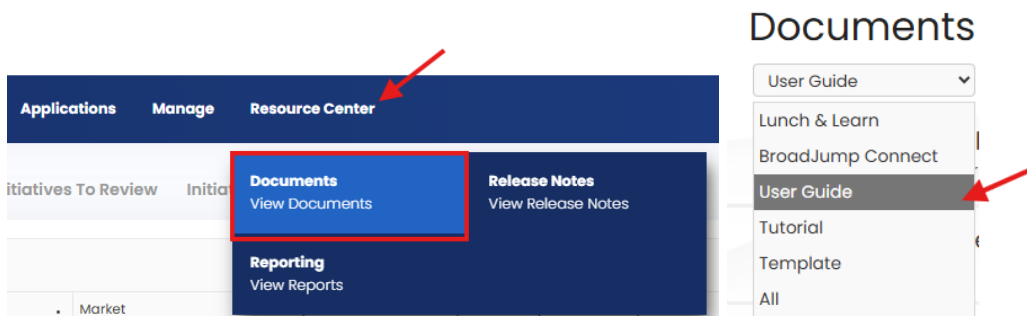
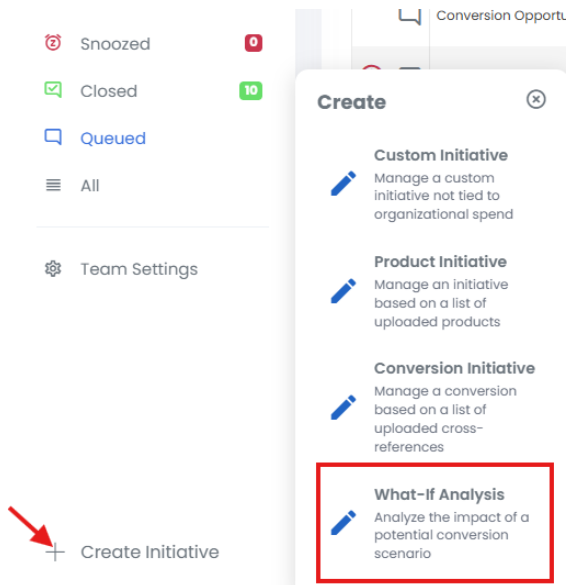
How to Start an Initiative: Conversion Initiative

Navigate to **Create Initiative** on the bottom left-hand page and select **Conversion Initiative**. Use the deep link labeled [Here](#) to download the template. Upload the template and fill out any necessary fields of information and select the **Start** button. Necessary fields are Initiative Name. Please refer to the Conversion Initiative User Guide under **Resource Center, Documents, User Guide**.



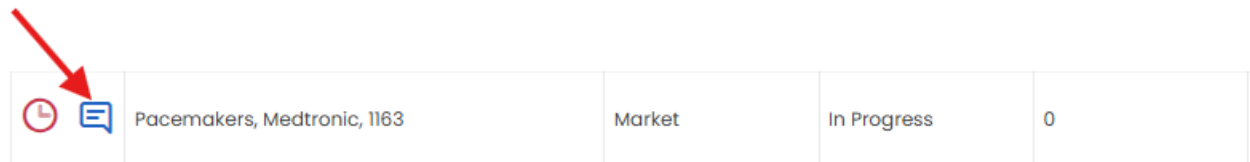
How to Start an Initiative: What If Analysis Initiative

Navigate to **Create Initiative** on the bottom left-hand page and select **What IF Initiative**. Use the deep link labeled [Here](#) to download the template. Upload the template and fill out any necessary fields of information and select the **Start** button. Necessary fields are Initiative Name. Please refer to the What If Analysis Initiative User Guide under **Resource Center, Documents, User Guide**.



How to Snooze an Initiative

Once users have located an initiative to snooze, they will open the initiative card by clicking on the initiative icon and select the **Snooze** button. It will prompt the user to select a reason and number of days with the notes being optional. Then select the **Snooze** button once again.



Initiative Details ✕

Pacemakers, Medtronic, 1163

Historical Spend [Product Detail](#) [Invoice Detail](#) Last Updated 12/10/2025
 \$1,393,280
 Not LOC
 Locally Eligible
 Expiration Date: 2025-01-31
 Effective Date: 2020-10-01

+ [Cardiac Rhythm](#) ✕

Opportunity Strategy **Details** Proposals 0 🔍 0 ✎ 0

Status
 In Progress ▼

Assigned To

Target Completion Date *
 10/31/2024 📅
*used to calculate Projected Savings for Active initiatives

Contract Number
 1163

Notes

Queue Archive **Snooze** Close Initiative Save

Snooze Suggestion ✕

Please specify the reason you would like to decline this suggestion

*required when declining an Initiative

This opportunity will be snoozed for:

| | | | | |
|---------|---------|---------|----------------|----------|
| 15 Days | 30 Days | 60 Days | 90 Days | 180 Days |
|---------|---------|---------|----------------|----------|

Notes

Snooze

Once an initiative has been moved to the snoozed tab the date can be edited to a specific date. Simply open the initiative card and update the date and select the **Save** button.

Initiative Details ✕

Pacemakers, Medtronic, 1163

Historical Spend [Product Detail](#) [Invoice Detail](#) Last Updated 6/22/2026
 \$1,393,280
 Not LOC
 Locally Eligible
 Expiration Date: 2025-01-31
 Effective Date: 2020-10-01

+ [Cardiac Rhythm](#) ✕

Opportunity Strategy Details **Snooze** Proposals 0 🔍 0 ✎ 0

Snooze Reason
 GPO Contract ▼

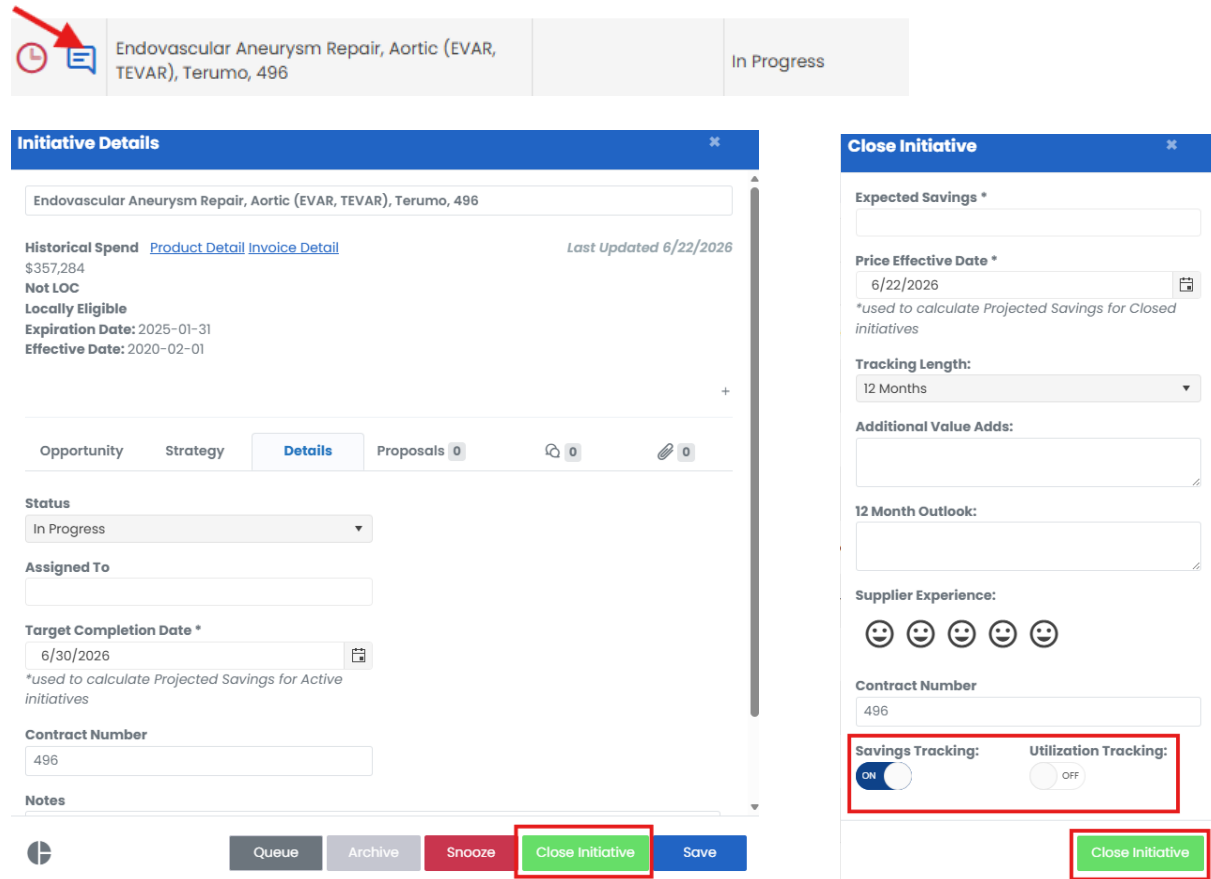
Snooze Until
 7/22/2026 📅

Notes

Queue Archive Start **Save**

How to Close an Initiative

Once a user has located an initiative that to close, simply open the initiative card by clicking on the initiative icon and select **Close Initiative**. Fill out the necessary fields of information and select **Close Initiative**. Please note that the savings will only be tracked in the PlaybookTracker report if the savings tracking is turned on. The same rule stands for utilization tracking.



Initiative Details

Endovascular Aneurysm Repair, Aortic (EVAR, TEVAR), Terumo, 496

Historical Spend [Product Detail](#) [Invoice Detail](#) Last Updated 6/22/2026
 \$357,284
 Not LOC
 Locally Eligible
 Expiration Date: 2025-01-31
 Effective Date: 2020-02-01

Opportunity Strategy **Details** Proposals 0 0 0

Status
In Progress

Assigned To

Target Completion Date *
6/30/2026
*used to calculate Projected Savings for Active initiatives

Contract Number
496

Notes

Queue Archive Snooze **Close Initiative** Save

Close Initiative

Expected Savings *

Price Effective Date *
6/22/2026
*used to calculate Projected Savings for Closed initiatives

Tracking Length:
12 Months

Additional Value Adds:

12 Month Outlook:

Supplier Experience:
😊😊😊😊😊

Contract Number
496

Savings Tracking: ON Utilization Tracking: OFF

Close Initiative

How to Queue an Initiative

Once a user has located an initiative to queue, simply click on the initiative icon and select the **Queue** button. The prompt will ask to confirm the option and select **Yes**. Please note that the queue option is better for initiatives created by mistake that need to be repopulated within Initiatives the same day. There is also an archive option that is listed below.

Initiative Details ✕

Endovascular Aneurysm Repair, Aortic (EVAR, TEVAR), Terumo, 496

Historical Spend [Product Detail](#) [Invoice Detail](#) Last Updated 6/22/2026
\$357,284
Not LOC
Locally Eligible
Expiration Date: 2025-01-31
Effective Date: 2020-02-01

+

Opportunity Strategy **Details** Proposals 0 0 0

Status
In Progress

Assigned To

Target Completion Date *
6/30/2026
*used to calculate Projected Savings for Active Initiatives

Contract Number
496

Notes

Queue Archive Snooze Close Initiative Save

Queue Initiative ✕

The status of this initiative will be updated to Queued.

Would you like to continue?

Yes No

How to Archive an Initiative

Please note that the Archive initiative option will **permanently remove** any information tied to an initiative. This is truly meant for custom initiatives that were created by mistake that need to be permanently deleted. If a non-custom initiative has been archived it will not be visible in Initiatives again until the next day. Simply open the initiative card by clicking on the initiative icon and select the **Archive** button. The prompt will ask to confirm the option and select **Yes**.

Initiative Details ✕

Endovascular Aneurysm Repair, Aortic (EVAR, TEVAR), Terumo, 496

Historical Spend [Product Detail](#) [Invoice Detail](#) Last Updated 6/22/2026
 \$357,284
 Not LOC
 Locally Eligible
 Expiration Date: 2025-01-31
 Effective Date: 2020-02-01

Opportunity Strategy **Details** Proposals 0 🔍 0 📎 0

Status
 In Progress ▼

Assigned To

Target Completion Date *
 6/30/2026 📅
*used to calculate Projected Savings for Active initiatives

Contract Number
 496

Notes

🔄 Queue **Archive** Snooze Close Initiative Save

Archive Initiative ✕

Archiving this initiative will clear all initiative data and move any associated opportunities to the Queued status.

Would you like to continue?

Yes No

How to Create and Edit a Strategic View

To create a custom view or grouping simply navigate to the Strategic View tab and select **Create New View**.

Playbook ☰

- Dashboard
- Strategic Views**
- Active 10
- Suggested 13
- Snoozed 0
- Closed 10
- Queued

Sacred Heart Health System CC ⓘ

Strategic Views Purchased Services Views

Sort by: Updated Date (Newest to O... Collapse All Expand All

Cardiac Rhythm Last Updated 6/22/2026

| | | | |
|--|--------------------------------|--|----------------------------------|
| \$1,676,704 Historical Spend | 3 Total Initiatives | | Strategic Approach N/A |
| \$203,000 Target Savings | \$0 Expected Savings | | |

🔍 0 📎 0 +

Create New View

Fill out the required fields for **Strategic View Name** and select the initiatives to add to the view, then select the **Create** button. The views are color highlighted and that can be edited since the default color is always orange.

New Strategic View ✕

Strategic View Name



Strategic Approach

Notes

Search by Initiative Search by Category / Mfg / Contract

Initiatives

Create

- Initiatives**
- pacema
 - Pacemakers, Abbott Vascular, 1164
 - Pacemakers, Boston Scientific, 1162
 - Pacemakers, Medtronic, 1163

Once created, if the strategic view needs to be edited simply click on the strategic view name to open the card, then make the necessary changes and select **Save**.

Cardiac Rhythm

Last Updated 6/22/2026 ↕

| | | | |
|---|--|--|---|
| <p>\$1,676,704 Historical Spend</p> <p>\$203,000 Target Savings</p> | <p>3 Total Initiatives</p> <p>\$0 Expected Savings</p> | <ul style="list-style-type: none"> 1 Active 0 Closed 0 Snoozed 0 Suggested 2 Queued | <p>Strategic Approach N/A</p> <p style="font-size: x-small;">🔍 0 ✎ 0</p> |
|---|--|--|---|

Initiative Details ✕

Cardiac Rhythm

Historical Spend Last Updated 6/22/2026
\$1,676,704

View
Initiatives
🔍 0
✎ 0

▾

Assigned To

Strategic Approach

Notes

Test

Archive
Save

To view the initiatives list within the strategic view simply click on the + sign.

📊

Cardiac Rhythm


Last Updated 6/22/2026 ↕

\$1,676,704
Historical Spend

\$203,000
Target Savings

3
Total Initiatives

\$0
Expected Savings



1 Active
0 Closed
0 Snoozed
0 Suggested
2 Queued

Strategic Approach
N/A

🔍 0
✎ 0
+

📊

Cardiac Rhythm


Last Updated 6/22/2026 ↕

\$1,676,704
Historical Spend

\$203,000
Target Savings

3
Total Initiatives

\$0
Expected Savings



1 Active
0 Closed
0 Snoozed
0 Suggested
2 Queued

Strategic Approach
N/A

🔍 0
✎ 0

| Name | Historical Spend | Summary | Last Update Date |
|---|------------------|-------------|------------------|
| 📄 Pacemakers, Medtronic, 1163 | \$1,393,280 | In Progress | 6/22/2026 |
| 📄 Implantable Cardioverter Defibrillators - ICD, Medtronic, 723 | \$184,105 | | 10/31/2024 |
| 📄 Cardiac Resynchronization Therapy - CRT, Medtronic, 174 | \$99,320 | | 10/31/2024 |

Initiatives Initiative Type Definitions:

| Initiatives Initiative Type | Definition |
|-----------------------------|--|
| Market | Savings initiatives identified by comparing market share and/or spend from comparable facility group sizes who are purchasing the same products. |
| Parity | Savings initiatives identified by pricing variance between one or more facilities within a hospital system due to contract difference. This could also be pricing variance between suppliers & manufacturers within a standalone facility. |
| Standardization | Initiatives identified by consolidating manufacturers or suppliers across categories or contracts. |
| Contract Renewal | Initiatives identified by a past due or upcoming contract renewal. |
| Other | Initiatives that do not fall under one of the provided initiative types. |
| New Product Introduction | Initiatives identified as new product introductions over three months compared to the last year of purchases. One of the objectives here is to reveal any products that were added without contracts or department approval. |
| Multiple | Initiatives defined as having more than one type. |
| Value Analysis | Initiatives identified or vetted by a user on the value analysis team. |
| Cost Avoidance | Initiatives defined by the preservation of existing spending to prevent price increases due to inflation, economics or the rising costs of products or services |
| Price Increase | Savings initiatives identified by the price increase on one or several products within a category or contract. |
| Quote/Proposal | Initiatives representing quotes or proposals that the BroadJump team processes for the client. The results and any other relevant information will be stored here. |
| Contract Implementation | Initiatives identified by implementing a new contract or revealing contract gaps within comparable products from manufacturer or supplier. |
| Operations | Initiatives identified or vetted by a user on the operations team. |
| Purchasing | Initiatives identified or vetted by a user on the purchasing team. |
| Contract Analysis | Initiatives identified by a contract in review or under analysis. |
| Rebate | Initiatives identified as product or contract with a partial refund given after purchasing products for recovery on the purchase price |
| Conversion | Initiatives identified when products are converted from one manufacturer/supplier to a different manufacturer/supplier. |

| | |
|-------------------|---|
| Tier Optimization | Initiatives identified as structuring and managing contracts so that pricing, terms, and obligations are aligned with specific customer or usage tiers, enabling more precise value capture, risk control, and operational efficiency |
|-------------------|---|