



## BACKGROUND

Founded with the help from several partners from The Clinic Colorado, the Clinic Nevada is a State-licensed, vertically integrated, and rapidly expanding Cannabis company.

The three core components of their business include:

- Agricultural operations, which consist of the cultivation, harvest, and packaging of cannabis flowers for wholesale distribution through licensed dispensaries and production facilities.
- Production operations, which encompass the extraction, post-processing, packaging and wholesale of concentrated cannabis products for distribution to dispensaries.
- And finally, the company operates a retail dispensary located several blocks off of The Strip across the street from the Palms Hotel and Casino.

Given the unique nature of their business, The Clinic's operations involve many different moving parts and challenges that include tracking thousands of grams of inventory moving through their facilities, managing and analyzing dozens of interconnected datasets across multiple departments, cross-departmental coordination and planning, and thorough documentation and accountability tracking tied to employees and HR records. Prior to TrackVia, The Clinic had relied on manual tools and processes to accomplish their work which quickly became unwieldy and presented almost immediate challenges for the lean organization.

Jon Marshall, Chief Operating Officer for The Clinic Nevada, noted that, "We were buried in the 'long tail of business processes' almost from the start, trying to both manage construction projects and streamline operations. Using tons of spreadsheets, paper, and emails was very inefficient, and operational gaps were opening up across the organization. The use of these tools lead to lost invoices, data entry errors, corrupt datasets, inventory management challenges, and poor or delayed analytics which caused work to be performed in silos, rather than synergistically, all which ultimately led to unnecessary complexity. At our best, we were being inefficient, and at our worst, we were running the risk of bumping into regulatory and compliance issues."

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Jon Marshall  
Chief Operating Officer  
The Clinic Nevada



The Clinic Nevada is a State-licensed, vertically integrated, and rapidly expanding Cannabis company that began operating in Las Vegas, Nevada in May of 2016. The Clinic Nevada was founded with the help from several partners from The Clinic Colorado, a 9-year-old recreational and medical cannabis company in Denver that has expanded their Colorado business to include 6 dispensaries, 3 cultivation facilities, and a production facility in addition to providing consulting, facility design and project management services to companies in Colorado, Nevada, and Illinois.



### The Solution

To address their operational challenges, Jon Marshall looked for a system that was rapid to implement, was fully customizable to their unique processes, had a clean, uncluttered user interface, and that could easily scale. Ultimately, he selected TrackVia's low-code application platform, noting that, "after vetting out several other solutions, TrackVia quickly seemed like a perfect solution for us. With their platform, we knew we could rapidly build a single application to address our immediate needs, and then easily scale our usage over time by building on our incremental successes. The other systems we considered simply didn't have flexibility that we needed, were too expensive in terms of their upfront costs or implementation timelines, and I was getting the impression that making changes to these other software solutions as we went was not going to be easy or affordable. Our needs change almost weekly as regulations and the industry evolve, and we needed the flexibility to constantly tweak our platform in real time."

To get started, Jon Marshall looked to leverage the system to streamline their production facility workflows and to achieve better traceability of their production batches and raw material use throughout the process. After implementing their first application, The Clinic gained newfound control over all aspects of their workflow and achieved real-time visibility into the management of raw material inventories, vendor relationships, yields, turnaround times, quality control of finished products, employee accountability, and state-mandated product testing. From there, they could identify their bottlenecks and begin fine-tuning their processes as material flowed through procurement, extraction, post-production, testing, packaging, and finally wholesale distribution for sale.

Once managers at the company experienced the ease-of-use of the system and witnessed the rapid value they were able to reap with their first application, their usage quickly expanded.

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The Clinic saves 50 hours of labor hours each day, equating to an annual savings of over **\$300,000**



### TrackVia in Action

The Clinic Nevada was able to use the TrackVia platform to quickly build out a multitude of interconnected, robust web and mobile applications, which now support nearly 95% of their daily operations. With TrackVia, they have all but replaced emails, spreadsheets, and file management solutions for their repeatable processes that occur minute-to-minute. In fact, their entire management team, warehouse and production staff, cultivators, and store managers rely heavily on TrackVia to manage their daily work. They've leveraged TrackVia to build custom apps that streamline and optimize a multitude of processes and workflows, such as:

- A/P and A/R invoice and vendor file management, using Zapier and Webmerge, to produce custom invoices and manifests,
- Production capability forecasting and harvest predictions.
- Extraction, post-production, 3rd party testing, and packaging operations,
- Raw material supply and work-in-progress inventory management,
- Order fulfillment and distribution management,
- Human resource and personnel file management, quality control and employee accountability tracking,
- Third-party production services and revenue forecasting,
- Retail store inventory management, sales analytics, and cash handling operations.

The Clinic utilizes their TrackVia applications to ensure employee accountability, operational efficiency, and product quality, in part by utilizing the features provided by TrackVia's native mobile apps, including the use of electronic signatures, geo-location tagging, and barcode scanning for receiving, shipping, and cash handling processes.

By eliminating manual work and fostering better coordination between teams, they have seen significant increases to employee productivity and accountability. With the ability to carefully set user permissions and roles in the system, they can ensure that their employee's interactions with the application are personalized, clean and straightforward. Most of all, they can rest assured that their forms are relevant to individual user tasks and are always pertinent to the process at hand.

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Jon Marshall  
Chief Operating Officer  
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of The Clinic's operations run on the  
TrackVia Platform

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## CASE STUDY

Using data to instantly drive their workflows, The Clinic employs TrackVia's custom reporting and analytics to drive significant improvements across multiple aspects of their business. Jon Marshall explained that, "Information is power, and the operational insights we've derived from the system's real-time, granular-level analytics and reports has been invaluable to our organization. We can make decisions at a moment's notice." They are now able leverage all of their company data within TrackVia to help them drive informed decisions around production planning, demand forecasting, product compliance and traceability, and supplier management. Perhaps most importantly, TrackVia helps them ensure that they are providing a quality product to their valued customers.

In addition, The Clinic estimates that they save 50 hours of work per day due to productivity and efficiency gains derived from the TrackVia platform. This amounts to an overall reduction of roughly 13,000 labor hours each year, which translates into over \$300,000 in cost savings annually.

### Apps for Expansion

After seeing how TrackVia's low-code platform could streamline operations management at several of The Clinic's locations, Jon Marshall saw an opportunity to leverage it to support their company growth and expansion efforts. Charged with opening new locations in other states, Jon leveraged the flexible nature of the platform to build out custom applications to manage their expansion into new markets. This allowed him to get new facilities up and running with customized apps for tracking processes, such as obtaining licenses, purchasing real estate, managing construction, hiring employees, and the like. Jon sums up his experience using the TrackVia platform stating, "I can't even describe the immense value that TrackVia has provided our business."

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Jon Marshall  
Chief Operating Officer  
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### CRITICAL SYSTEM REQUIREMENTS



- Highly scalable enterprise platform
  - Rapid low-code app deployment
  - Web-based access
  - Real-time reporting tools
  - Accurate, centralized data
  - Ability to customize for specific, proprietary workflows and processes
  - Highly secure
  - Team collaboration tools
  - World-class customer support and training
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