



Partners HealthCare Case Study

By Alison Charello

Ever put your car keys down and not remember where? Or you go to that certain desk drawer where you've kept your checkbook forever, and it's not in that familiar space. On certain days, it's hard to keep track of our personal assets. How then, do large organizations keep up with their IT assets? Who has the newest PC, scanner, or flat screen monitor? What software is running in the Accounting department? When that 250-employee department moved, what IT assets were disposed of and what new software got loaded on each desktop at the new site? If you've ever asked yourself any of these questions, or simply wondered how you might improve the way your company keeps up with its IT assets, it may be time to explore IT Asset Management.

What is IT Asset Management (ITAM), *exactly?*

The reason many companies don't have a comprehensive IT Asset Management initiative may be because they're not completely clear on what ITAM is or how to get it. ITAM isn't merely a mechanism for tracking IT purchases and disposals, it's not a high-end bar-coding and scanner systemization, it's not a fancy tool for tracking break/fix or change/move, and it's not the only way to understand software licensure. But ITAM **is** a solution every evolving organization should consider having to help increase efficiency, reduce operating costs, and improve service. Simply put, IT Asset Management is a portfolio of a company's technology assets, bringing together inventory, configuration, demographic, financial, and contractual data.

Why One Organization Knew They Needed ITAM

Partners HealthCare System, Inc., based in Boston, is an integrated health care network of hospitals and physicians. In planning for the future, the non-profit knew they needed a better system to track their technology assets. When Mary Buonanno, Corporate Manager of Network Services, joined Partners they were a single hospital, and she supported less than 5,000 desktops just 7 short years ago. Today, Buonanno heads up IS Support Services, where she's responsible and accountable for support to 20,000 desktop users. Supporting the help desk environment, desktop technology, email administration, procurement of hardware and software, as well as supporting 9,000 remote access users, has been challenging for the IS Support Manager. According to Buonanno, "With patient care as our number 1 priority, Partners made the decision to purchase an IT Asset Management (ITAM) System because we knew we needed a way to track everything from procurement of our assets through disposal. It was more cost effective to make the investment than trying to create a system internally."

The Investment and Its Return

In organizations with technology departments, many IT leaders think IT Asset Management is simply the creation of a good spreadsheet. But finding a suitable "homegrown" solution is hard to come by, especially one that assists organizations by bringing together the various aspects of asset management like: hardware and software procurement, shipping & receiving, lifecycle management, break/fix solutions, warranty follow-up, problem resolution, mandatory reporting, and disposal of assets. Each of these disciplines often resides in various departments, and finding the synergy to bring the data together in one system isn't easy. At Partners HealthCare, the hospital had been

using Microsoft SMS tool for inventory tracking, but recognized they needed a total asset management solution if they were going to be successful at providing staff with complete data and tools to provide first rate patient care.

Mary Buonanno and her colleagues in the hospital's IS department felt it was important to look outside of Partners for industry experts to help them bring a full solution together; both tools and effective business discipline. Partners HealthCare decided on Peregrine Systems' AssetCenter, then looked to TekMethods, LLC, a Tampa-based IT Asset Management company, for the advice and guidance needed to optimize their Peregrine investment.

How Partners HealthCare Took the Steps to Build Their ITAM Program

So what do organizations with 500-50,000 desktops do to build their asset management system? They start with a company that understands both asset management and their business, and can leverage the existing infrastructure and tools. Partners elected to employ TekMethods, a 3rd party technology company, to build their asset management solution so their in-house IT staff could continue to address the day-to-day operations of the IS department. And with limited in-house expertise in the asset management discipline, they felt it was important to hire experts who would consider their unique hospital objectives and build a scalable solution that would address the hospital's long-term growth initiatives. According to Mary Buonanno, "It was more cost effective to hire TekMethods than to re-direct our internal resources away from patient care initiatives to work on an individual technology initiative. TekMethods made sure they understood our hospital environment and our business, so hiring outside subject matter experts was a good decision for Partners."

TekMethods, who focuses exclusively on the asset management arena, built a total platform for Partners HealthCare. They took the following steps for Partners:

1. Assessment, Planning & Solution Design

Every good asset management program starts with an assessment of the organization's unique business challenges and points of pain in managing technology assets. TekMethods reviewed the hospital's environment, conducted rigorous discovery exercises, participated in numerous interviews with key hospital IS and Finance staff, then provided a comprehensive report of findings and recommendations along with a go-forward strategy and project plan.

2. Asset Management Data Dictionary

Once TekMethods completes its assessment stage, it hands off a valuable tool to its client. Aptly named the Asset Management Data Dictionary[®], this proprietary methodology outlined all of the data elements to be managed, their attributes, points of capture or update, and the integration points between systems. Once completed, the business discipline needed to maintain integrity of each of the data elements that was developed and implemented.

3. Physical Inventory Services, Bar-coding & Hand Held Scanner Technology

In a modern hospital environment, technology assets, including patient testing equipment, can change at a rapid pace to keep up with the latest

medical care regimens. With a platform migration project on the horizon, inventory was done in-house during the migration. TekMethods supported this effort and provided specialized hand-held scanner technology to gather the appropriate data and cleanse and normalize it for input to the master repository. Additionally, TekMethods implemented its hand-held scan technology to capture change information at the source: in the Shipping & Receiving department, during installations and moves, when adding and changing out hardware and software, as well as at the point of disposal. This best practice technique improved data quality and eliminated the tedious and manual process of gathering the data.

4. Reporting & Ongoing Support

Although there was a report generating function inherent in Partners' inventory software, IS management was also interested in full-scope asset reporting. TekMethods was able to assist the healthcare organization by creating custom reports and exports, training internal hospital staff on its use, and later providing ongoing system support as the hospital added new equipment, software, and demographic information to the database.

5. Check-ups

Doctors aren't the only service providers conducting check-ups and making house calls. TekMethods strongly recommends at least one check-up per year to keep Partners HealthCare's ITAM initiative up-to-date. Change is a constant in any IS organization and the asset management solution and business processes must change correspondingly.

Once TekMethods' implementation was completed, Partners HealthCare's 9-hospital organization was able to manage 60,000-70,000 IT assets in their system much more effectively, although they haven't yet scratched the surface on the solution's capabilities. And Mary Buonanno couldn't be more pleased with the results: "ITAM serves a great purpose here. We always know where our technology assets are. The hospital is better informed and can provide a greater level of patient care because of ITAM, and I am better able to make smarter technology decisions because of what I know through Partners' ITAM program."

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