smartsheet

AdventHealth centralizes regional healthcare provider data and accelerates project management timelines with Smartsheet

AdventHealth is a faith-based health care system with a footprint that spans 53 hospitals across nine states and a robust network of outpatient clinics and post-acute care sites. AdventHealth employs 91,000 team members and more than 2,600 physicians who help deliver care to 7.1 million patients annually, both in person and digitally.

> **We have a small team. Smartsheet has become our single source of truth for all provider, physician recruitment, and new location data, enabling us to operate as a project management office for the West Florida Division region.**

Maria Boyd, Assistant Vice President of Project Management at AdventHealth

AdventHealth

Customer:
AdventHealth

Industry:
Healthcare

Organization Size:
Enterprise (10,000+ employees)

Region:
North America

Website:
adventhealth.com

As a faith-based healthcare system, AdventHealth is guided by a holistic mission to care for body, mind, and spirit. The organization delivers care to 7.1 million patients every year, through 53 hospitals and a network of outpatient clinics and post-acute care facilities.

Background

With facilities spread across nine states, AdventHealth relies heavily on its Project Management department, which uses Smartsheet to track everything from construction project to process improvement and physician onboarding. "*With Smartsheet, we're more efficient as a department,*" says Maria Boyd, assistant vice president of project management at AdventHealth. "*We can seamlessly track all our projects from start to finish.*"

Before Smartsheet, AdventHealth West Florida teams lacked a method for tracking projects, which became an issue as more departments in the organization requested project management assistance. "*We didn't have the right tools. AdventHealth team members relied heavily on email or spreadsheets, and there was little visibility into projects or provider information,*" says Natalia Lara, project manager at AdventHealth. As a result, departments spent a lot of time duplicating efforts, manually following up, and tracking project progress. "*Our teams sometimes managed hundreds of different tasks with different stakeholders, which required many emails back and forth,*" says Boyd. "*It was almost a fulltime job for me to try and track down the right person and the most updated information on a project. Then, by the time I got a response back from the right person, it was already time for a follow-up email reminder about a deadline. We have a strategic goal to have lean operations in our department, and we knew we had to increase efficiency to achieve that.*"

Solution

The AdventHealth Project Management team adopted Smartsheet because of the solution's features and its simplicity. "*Smartsheet is very user friendly. Most of us don't have a programming background, and this is a low-code tool that enables us to easily build a custom project management solution,*" Lara says.

Customer:

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Maria Boyd, Assistant Vice President of Project Management

AdventHealth uses Smartsheet every day to centrally track and manage provider onboarding and offboarding, physician recruitment, construction, and department initiatives. Project managers can enter new project information, update a project's status, and track progress from one location in Smartsheet. Through automated workflows in Smartsheet, deadline reminders and other milestone notifications are sent to stakeholders across West Florida. *"We have multiple stakeholders throughout the AdventHealth system, and we have hundreds of notifications built into Smartsheet so each stakeholder receives reminders and timely updates on projects,"* Boyd says. When a new project is initiated in Smartsheet, we build solutions with automatic messages that notify specific stakeholders of the next required step in the workflow process so initiatives continue to flow smoothly.

AdventHealth also uses Smartsheet to build project reports and dashboards for project teams, stakeholders, and executives. Each dashboard contains overviews of projects, providing updated metrics and status updates. Departments can access custom dashboards to see start dates and other key onboarding information, and executive leadership can get a snapshot of each phase of a project or provider data. AdventHealth executives also use dashboards to track provider initiatives documents uploaded to Smartsheet by business development and strategy teams.

In addition, AdventHealth uses Smartsheet for collecting and storing acquisition data shared from external parties. *"We work with external parties during acquisitions, and we can simply share a unique link in Smartsheet with them for them to easily upload financial documents,"* says Boyd.

A single source of truth for provider, recruitment, and location data

AdventHealth is using Smartsheet to centralize all project data and streamline project tracking for hundreds of projects at any given time. Now, instead of sending multiple emails to stakeholders and searching through multiple spreadsheets for

In a Nutshell:

With the help of automatic notifications and reports and dashboards in Smartsheet, AdventHealth executives have better visibility into the onboarding process because they can access real-time, detailed data in Smartsheet dashboards.

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Maria Boyd

updated information, project stakeholders can view everything in one place. "*Smartsheet helped us streamline and centralize our processes for physician onboarding and recruitment, providing better communication in our departments*" says Boyd. "*We have a small team. Smartsheet has become our single source of truth for all provider, physician recruitment, and new location data, enabling us to operate almost like a project management office for the entire West Florida region.*"

Previously, AdventHealth had to manage separate work plans for each onboarding transition type, including provider acquisitions and departures and location moves. "*Each transition had different tasks, and there could be up to 300 items to track for everything,*" says Lara. "*By moving all this data to Smartsheet, we created templates to use that brought all this information together. It just makes everything more efficient and quicker to access.*"

A more accurate onboarding process through better visibility

With the help of automatic notifications and reports and dashboards in Smartsheet, AdventHealth executives have better visibility into the onboarding process because they can access real-time, detailed data in Smartsheet dashboards. "*Stakeholders don't have to spend time searching for project data – it's all there for them to access with a single click,*" says Boyd. "*They can quickly find the documents they need.*" With easier access to information, executives can see a real-time snapshot of the precise number of healthcare providers that are onboarding or departing. "*We now have an accurate list of the provider roster and can track AdventHealth growth trends in Smartsheet,*" says Lara. "*We can see how many providers are offboarding or changing locations, as well as how long it's taking for new providers to onboard. Our onboarding team shared that provider data visibility and transparency has improved significantly since implementing Smartsheet. Our recruitment teams shared they are saving hours of work with automated workflows and metrics. Now, we can clearly determine why it could be taking 30 to 90 days or 120 days for recruitment or onboarding*

The company's Project Management department also saves time and money by automating management tasks and avoiding manual data entry and emailing.

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Maria Boyd

to be completed and we can take action to accelerate it."

Stakeholders also have better visibility with Smartsheet and can ensure projects meet critical milestones throughout the process. *"Our approval processes work more smoothly, because we're able to track timelines and closely monitor delays in our processes,"* says Lara. *"Dashboards also help keep us all accountable for our action steps. Nobody wants to see a project flagged as past due on a dashboard, so this kind of visibility provides more accountability and transparency. It also shows us how many active initiatives we have in different markets, or how many specialties other markets plan to recruit for, because all this information is centralized and visible to each stakeholder."*

Reduced project turnaround time

Because of the efficiencies gained through Smartsheet, AdventHealth can reduce the turnaround time for new initiatives. *"We can move through processes faster in Smartsheet, so if we see some of our projects not moving after a long period of time, we can get that down to less time from start to finish,"* Boyd says. AdventHealth's Project Management department also saves time and money by automating management tasks and avoiding manual data entry and emailing. *"I would need at least two additional staff members to do all the administrative work Smartsheet does automatically for us, such as sending out reminders and tracking projects,"* Boyd says.

As a next step, AdventHealth will explore the adoption of additional Smartsheet features and capabilities. *"Smartsheet is really starting to take off and be adopted by other departments, too,"* says Boyd. *"I never expected it to give us such day-to-day process improvements and create so much visibility throughout the entire organization. It has really transformed the way we do things."*

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