

# Adventist Health About to Make a Smooth Move from HEAT Help Desk to HEAT Service Management in the Cloud

Adventist Health is a faith-based, nonprofit integrated health delivery system serving California, Hawaii, Oregon and Washington. Adventist Health provides compassionate community care and is founded on the Seventh-day Adventist heritage. Adventist Health operates 20 hospitals, more than 275 clinics, 15 home care agencies and 7 hospice agencies as well as 4 retirement centers as joint ventures.



## ORGANIZATION

**Name:** Adventist Health

**Location:** California, Hawaii, Oregon and Washington

**Industry:** Healthcare

**Website:** [www.adventisthealth.org](http://www.adventisthealth.org)

## SOLUTION

HEAT Service Management

## BENEFITS

- Easily migrate from HEAT Help Desk to HEAT Service Management in the cloud
- Create a strong foundation for continuous enhancements
- Support IT and clinical workflows for 650 staff
- Improve IT service quality while lowering cost

## An Aging Helpdesk Platform

HEAT Help Desk has been an integral part of Adventist Health's IT support operations for more than a decade, but the software had finally reached its limits. "We were pushing the boundaries," recalls Wendell Bobst, Assistant Vice President of Information Technology Customer Services at Adventist Health.

Adventist Health set out to look for a modern service management platform that could be tailored to the challenges of supporting the IT and clinical processes of a 23,000-employee organization. "We wanted to build a path to more effective support, better clarity of work types and improved customer service," says Bobst. The goal was to find a cost-effective approach to upgrading to a modern platform.



"HEAT met our three objectives: the opportunity to do a migration rather than an outright build, to clearly differentiate work type requests, and a platform to enhance our core IT processes."

*Wendell Bobst, Assistant Vice President, Information Technology Customer Services*

With these goals in mind, Adventist Health approached HEAT Software about upgrading to the current HEAT platform. HEAT Software offered Adventist Health new programs and tools specifically designed to facilitate a progression from "Classic" HEAT to HEAT Service Management, either in the cloud or on premise, while leveraging its current configurations and data.

"HEAT met our three objectives: the opportunity to do a migration rather than an outright build, to clearly differentiate work type requests, and a platform to enhance our core IT processes," says Bobst.

One of the key criteria for the decision was the ability to differentiate between “break/fix” incidents and new service requests, which were distinguished by a different priority in “Classic” HEAT Help Desk. This serves as the foundation to design, build and monitor service agreements through their lifecycle.

### Setting the Migration Strategy

Bobst considered two approaches. “We considered several variations using the new Call Logging module; however, these always included a subsequent change to HEAT Service Management. The process improvements we needed led to the decision to build and implement Incident and Service Request in the new platform,” he says.

Adventist Health chose a multi-phase approach to migration, rather than waiting for the big bang of perfect deployment.

“Call Logging appears to be great for IT environments that don’t want to make a big change. They can wash their hands of hardware and software and go to the cloud. They don’t need to spend a long time learning a new platform.”

While not implemented as initially anticipated, Call Logging will serve a critical purpose. “Our archive strategy is to convert all of the old tickets to Call Logging, so we will continue to have access for analysis, reporting and auditing,” he says.

### A Plan for Continuous Improvements

Incident management and service requests are just the beginning. “We’ll have multiple go-lives over the course of the year as we package up consumable processes and educate the team on the opportunities to deliver more business value,” he says.

Today, HEAT is primarily used to support IT service management by approximately 650 IT staff. Adventist Health wanted to ensure their new platform would facilitate the creation, usage and ongoing support of workflows that would provide the services needed by IT and other departments.

One big area of opportunity is the ticket management process within the clinical information systems. “Clinical teams have the most complex processes that they wanted to improve,” he says. The integrated tools and workflow should be a great addition for our customers.

“One of the great things about the HEAT team is that they listen to the customer but also give advice.”

Wendell Bobst, Assistant Vice President,  
Information Technology Customer Services

The IT team is updating its service catalog, and with 800 “skeletal” service requests the team is using the native tools to develop friendly, user-facing service requests. The service requests range in complexity, and “some can be done in hours and some take weeks,” he notes.

Knowledge and problem management are next. With the basics of knowledge management in place, IT can offer self-service. “Knowledge is a lifelong endeavor,” says Bobst. “We also expect Change Management to provide a significant improvement as we lack an integrated solution that requires duplication.”

### A Strong Relationship

Finding the right balance between having a service management platform that fits the way the organization works—and getting locked in with a solution that’s too customized was a priority. The Adventist Health team worked closely with the HEAT Software professional services team to determine the best design. “We’re trying to stick close to the build model, so we don’t go too far out of the box,” he says. “We don’t want to be so far out of the box that every time there’s an update I have to prep for three weeks.”

Adventist Health has a trusted relationship with the team at HEAT Software. “One of the great things about the HEAT team is that they listen to the customer but also give us advice,” he says. He sees a broader benefit of working with the HEAT professional services team. “Whatever development I pay for, I’d like to see it driven back into the product so that it becomes out-of-the-box when I consume it.”

And that partnership is enabling Adventist Health to continually improve IT support services and deliver superior care to the communities it serves.

### HEAT Software USA Inc.

490 N. McCarthy Blvd. Milpitas, CA 95035 USA  
P. +1 800.776.7889 or +1 408.601.2800