



Ballad Health EPMO uses Smartsheet Modern PPM to integrate 20 hospitals

Ballad Health, based in Johnson City, Tennessee, is a healthcare system that operates 20 hospitals and urgent care and primary care sites across Tennessee, Virginia, North Carolina, and Kentucky.

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The labor shortage is real, and our resources are constrained like many other healthcare organizations. Smartsheet Modern PPM increases our efficiency and productivity, so everyone on our team is working to their highest potential on our projects. Instead of manually calculating everything, we can just sit back and let Smartsheet Modern PPM do it all. ”



Isaac Mitchell, Vice President of Project Management and Operational Excellence at Ballad Health



Customer:

Ballad Health

Industry:

Healthcare

Organization Size:

Enterprise (10,000+ employees)

Region:

North America

Website:

balladhealth.org

Ballad Health is an integrated community health improvement organization dedicated to improving the health of nearly one million people in Northeast Tennessee, Southwest Virginia, Northwest North Carolina, and Southeast Kentucky. The organization operates a system of 20 hospitals, post-acute care and behavioral health services, and a multi-specialty group physician practice.

Background

Even though its facilities are spread across 29 rural counties, Ballad Health strives to give its employees unified communication capabilities. *"We want to be the leader and innovator in delivering healthcare in rural America and the Appalachian Highlands,"* says Isaac Mitchell, vice president of project management and operational excellence at Ballad Health. *"It's a challenge to do that because our healthcare team is located in different places and we're constantly looking for new and better ways to work together."*

Ballad Health uses Smartsheet Modern PPM to bring its disparate teams together to centrally manage projects and surface critical data using dashboards to executives. *"Smartsheet helps us come together and work as a unified team toward meeting our mission, to honor those we serve by delivering the best care possible,"* Mitchell says.

Before it adopted Smartsheet Modern PPM throughout the organization, the Ballad Health Enterprise Program Management Office (EPMO) relied on a mix of email, project management tools, and spreadsheets to track action items, team utilization, project capacity, and ROI. *"We had no common place where everyone went to find information,"* says Mitchell. *"We stored meeting minutes in one place, and project plans in another place, and we often had to convert data to PDFs and manually send them to people. I would spend 25 percent of my week preparing data for a slide presentation for a steering committee meeting."*

Without a unified tool, the Ballad Health EPMO could become a bottleneck. *"My team was the only source when someone needed to know the status of a project or needed a report,"* Mitchell says. *"As a result, we were delivering flat documents and updates via email. We wanted to find a more dynamic way of managing projects, instead of using status documents that became outdated the moment we sent them. Ultimately, we wanted to automate manual work, so we had more capacity*

Customer:

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Smartsheet helps us come together and work as a unified team toward meeting our mission, to honor those we serve by delivering the best possible care. ”

to focus on larger initiatives that helped us better serve our customers.”

Solution

After considering several software solutions, Ballad Health selected Smartsheet Modern PPM as its project management tool. *“We wanted something that we could share with our entire organization in a cost-effective manner, and Smartsheet fit the bill,”* says Mitchell. *“Smartsheet is also flexible. We didn’t want a predefined solution – we needed something that we could use to fit our specific needs, and that’s what Smartsheet does.”*

The Ballad Health EPMO uses Smartsheet Modern PPM to manage over 150 projects at any given time. As adoption has increased, additional teams including operational excellence, finance, and marketing have started using the tool to track projects. *“Smartsheet Modern PPM is very intuitive and easy to work with, which is why our adoption continues to grow quickly,”* says Mitchell.

With automated workflows in Smartsheet, Ballad Health can automatically send project deadlines and reminders to project managers and other stakeholders throughout the organization. Ballad Health also uses Smartsheet Modern PPM to build reports and dashboards containing high-level overviews of each project. The organization’s executive teams can access the dashboards to quickly view the latest status of a project. *“Through automated workflows, we’ve linked our sheets, reports, and dashboards together in one place,”* Mitchell says. The organization relies on premium capabilities such as Smartsheet Dynamic View to give project managers access to the specific data they need, and Data Shuttle to upload financial data from multiple external sources into Smartsheet.

More efficient project management and better communication between 20 hospitals

Using Smartsheet Modern PPM, Ballad Health can automatically track projects from start to finish without needing to rely on manual data entry, multiple spreadsheets, and email. *“Previously, when I would provide project status updates to our executives, I’d spend several days preparing a report. Now, I can provide all project data to them*

In a Nutshell:

Smartsheet Modern PPM has also increased internal communication by centralizing project data through integrated sheets, reports, and dashboards.



With Smartsheet Modern PPM, we can communicate better, from a rural hospital in Southwest Virginia all the way up to our corporate office in Northeast Tennessee.



at the click of a button in a dashboard, with the data automatically refreshed each time a project manager enters an update.” The Ballad Health EPMO saves more than 60 hours of administrative time per week – more than 3,000 hours annually – by not having to create slide presentations for steering committees and leadership meetings. *“The labor shortage is real, and our resources are constrained like many other healthcare organizations,”* Mitchell says. *“Smartsheet Modern PPM increases our efficiency and productivity, so everyone on our team is working to their highest potential on our projects. Instead of manually calculating everything, we can just sit back and let Smartsheet Modern PPM do it all.”*

Smartsheet Modern PPM has also increased internal communication by centralizing project data through integrated sheets, reports, and dashboards. *“With Smartsheet Modern PPM, we can communicate better, from a rural hospital in Southwest Virginia all the way up to our corporate office in Northeast Tennessee,”* says Mitchell. *“One of my personal goals for this year is promoting system collaboration and sharing best practices across 20 hospitals. Smartsheet Modern PPM supports that goal by efficiently improving communication and collaboration.”*

Providing better healthcare to citizens

By automating manual processes and saving time building reports and preparing for meetings, the EPMO can take on more projects and focus on strategic initiatives. *“Smartsheet Modern PPM frees up our time to think about bigger projects, like our quality and safety dashboards that will help us better serve the community and provide the best possible healthcare,”* says Mitchell.

The organization’s project managers are also spending more time analyzing population health data to find ways to reduce the potential of lives lost because of health problems. *“Smartsheet Modern PPM helps us uncover data that was previously hidden in spreadsheets and static reports. Now, we can discover the specific data we need to track, such as metrics about health outcomes, and how we can improve healthcare outcomes across the region we serve,”* Mitchell says.



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Accelerating project process through transparency

Ballad Health has more visibility into projects and data through Smartsheet Modern PPM, providing more transparency across the organization. For example, a new system-wide dashboard and calendar that contains updated information on strategic initiatives can be accessed by anyone within Ballad Health, including all PMO groups, front-line clinical teams and corporate leadership. Another dashboard features the return on investment (ROI) from process improvements and project go-lives. *"We're working closely with our finance team to calculate project ROI in the dashboard and validate those metrics,"* says Mitchell. *"This creates transparency so everyone can see our process and success."* In the past fiscal year, Ballad Health has seen an ROI of more than \$30 million, with a return per team member of 16 times the investment.

Additionally, Ballad Health built a dashboard where integrated physician practice partners can view updated progress on projects. *"This gave our partners the transparency to see through real-time data, if we're winning or losing on a given project,"* Mitchell says. *"Ultimately, this has helped us progress more quickly and we're now seeing significant gains on ROI metrics for those projects. In addition, our project managers are able to take on 30 percent more projects."* Ballad Health also uses Smartsheet Modern PPM to provide transparency into resource utilization, which helps project managers better plan projects. *"With this information, we can see if we need more team members on a project and we can then start having better discussions about organizational priorities,"* says Mitchell.

Ballad Health is currently seeking to expand adoption of Smartsheet Modern PPM into areas including innovation, marketing, communications, population health, strategic planning and behavioral health. Says Mitchell, *"We will keep developing dashboards and reports in Smartsheet Modern PPM to better track our performance and keep the focus on what truly matters: serving the health needs of our community."*

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With this information, we can see if we need more team members on a project and we can then start having better discussions about organizational priorities. We will keep developing dashboards and reports in Smartsheet Modern PPM to better track our performance and keep the focus on what truly matters: serving the health needs of our community.

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