WORK at LIGHTSPEED

Transforming Customer Service at TriMedx

DOUG FOLSOM
CHIEF INFORMATION OFFICER
TriMedx
Agenda

• Introduction
  – Who we are
  – What we did
  – How it pertains to you

• The TriMedx and ServiceNow Journey
  – Challenges
  – Solutions
  – What we learned

• Wrap Up
  – Where will we go from here
  – Q&A
Speaker Introduction

Name: Doug Folsom
Title: Chief Information Officer
Function: Information Technology, Clinical Asset Management Services
Company: TriMedx

EXPERIENCE: 30 years of information technology leadership across various industries

EXPERTISE: Business transformation, process improvement, architecture

ACHIEVEMENTS: Initiated and led large scale technology and transformation projects in multiple companies. Ran large B2B SaaS systems and managed services platforms.

CURRENT PROJECTS: Operational transformation using ServiceNow, Automation of backoffice processes – procure to pay, HR systems, Contracts, Account Management
About TriMedx

NAME: TriMedx

INDUSTRY: Clinical Asset Management

MARKET FOCUS: Outsourcing of clinical equipment management and maintenance providing cost savings by right-sizing of inventory fleets, increased staff productivity, and intelligent capital equipment planning for Global Hospital Systems of over $10B in annual revenue

COMPANY’S PRIMARY PRODUCTS/SOLUTIONS: Clinical Engineering (Radiology, Laboratory, Biomed Equipment Maintenance), Moveable Medical Equipment Management (Pumps, Beds, Lifts, Chairs), CE–IT Integration (ePHI HIPAA Compliance, EMR), Capital Equipment Lifecycle Management

COMPANY-WIDE INITIATIVES: Increased Patient Safety, Responsiveness to Customers Needs, Cost Savings to Customers, Regulatory Compliance, Data analytics
Session Overview

Objectives

- Increase efficiency and effectiveness, while reducing costs.
- Improve speed to market

What You Will Learn

- Understand the healthcare environment and challenges facing most companies today
- Learn about the key advantages of ServiceNow® Customer Service Management (CSM), Field Service Management (FSM) and the mobile application
- Gather key critical success factors (CSFs) for a successful implementation
- Discuss how the lessons may apply to you for your initiatives/projects
Business Landscape

• Rapid Growth – Largest independent provider of Clinical Engineering Services
  – Today: 1,800+ client healthcare locations (17% growth since 2015)
  – Constantly shifting complex regulatory environment
  – Federal and state regulations, NFPA, FDA, CMS
  – Accreditation requirements: The Joint Commissions, HFAP, DNV, CAP, CLIA

• Strong competition from OEMs, in-house programs, and multi-service hospital support companies (food, uniforms, facility & medical equipment maintenance) driving commoditization of some services

• Data-driven business
  – Patient welfare, customer satisfaction, and competitive advantage is dependent on data availability and accuracy

Core Values:
Service of the Poor | Reverence | Integrity | Wisdom | Creativity | Dedication
What TriMedx Does for Our Customers

• Gain total visibility into all clinical assets and deploy a unified strategy for managing them.

• Improve economics by planning, managing, and deploying clinical assets in more efficient and sophisticated ways.

• Free up capital that can be reinvested in other vital areas of patient care.
Drivers for Change

• Old platform challenges: RSQ
  – Data inconsistency
  – Historical “bolt-ons” inhibiting agility and growth
  – Lack of consistent application architecture

• Need for flexible “center piece” to build new value-add offerings for customers

• Data availability and accuracy – decision support and analytics
  – Maintain historical data

• Diversity of Operations
  – 1800+ Client healthcare locations
  – Technician: Mixture of TriMedx and hospital employees

RSQ = ‘Red Square’
Drivers for Change

- Old platform challenges: RSQ
  - Data inconsistency
  - Historical “bolt-ons” inhibiting agility and growth
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- Need for flexible “CENTER PIECE” to build new value-add offerings for customers
- Diversity of Operations
  - 1800+ Client healthcare locations
  - Technician: Mixture of TriMedx and Hospital employees
- Data availability and accuracy

CURRENT STATISTICS:
- Devices under management: 1,738,464
  - Device types: 75,000+
- Unique Customers: 1,017
- Active users: 1,504
- Average work orders per month:

<table>
<thead>
<tr>
<th>WORK ORDER TYPE</th>
<th>MONTHLY AVERAGE</th>
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</thead>
<tbody>
<tr>
<td>Preventative Maintenance</td>
<td>63,055</td>
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<tr>
<td>Repair</td>
<td>36,869</td>
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<tr>
<td>Initial Inspection</td>
<td>28,978</td>
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<tr>
<td>Alert</td>
<td>40,370</td>
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<tr>
<td>Time</td>
<td>4,497</td>
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<tr>
<td>TOTAL</td>
<td>173,769</td>
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</table>
Solution – Modernize RSQ

• Reviewed several platforms
  – Completed due diligence in selecting a platform
  – Compared key functionality, future potential, and cost of each platform

• ServiceNow selected as the platform for RSQM
  – “Hub” of TriMedx operations
  – Configurable and tailorable
    • Enables speed to market
  – Domain separation: Supports diversity of operations while maintaining process and data standardization
  – ServiceNow Applications
    • Customer Service Management: Reduce customer effort and increase customer satisfaction...all while driving new business opportunities
    • Field Service Management: Access and deliver work orders anytime, anywhere
    • Mobile application: Supports the ability to work on-the-go in a fast paced environment, where time saves lives
Solution – RSQm

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Customer Service Management

• Reduce customer effort and increase customer satisfaction...all while driving new business opportunities
  – Lower support costs
  – Predicting trends to drive actionable improvements
    • Trends related to medical devices
    • More effective preventative maintenance schedules
  – Strategic focus on new business, transformation, and revenue

• Transparency from customer contact-to-device repair
  – Increased customer satisfaction

OUR CUSTOMERS ARE THE HEALTHCARE PROFESSIONALS TAKING CARE OF YOU AND YOUR FAMILY.
Field Service Management

• Access and deliver work orders anytime, anywhere
  – Work orders: Preventative maintenance, repairs, alerts (vendor mandated updates/recalls)
  – Replace costly break-fix with preventative maintenance
  – Increase field productivity
  – Access from the desktop and mobile application
  – Minimize business disruption

IN OUR WORLD, BUSINESS DISRUPTION IS NOT JUST AN INCONVENIENCE, IT IMPACTS THE LIVES OF OUR PATIENTS.
Mobile Application

• Work on-the-go, where time saves lives
  – Quick access to key data and information
• Supports the key driver to minimize business disruption

ENABLING AND EMPOWERING FIELD SERVICE ANYWHERE, ANYTIME THROUGHOUT THE HOSPITAL.
Typical Use Cases

Call Generated
- Call Center
- Self Service
- Automated equipment alert
- OEM/FDA Alert or Recall
- Preventive Maintenance

Work Order Activity
- WO Assigned
- WO Activity
- Review ISP (Integrated Service Plan)
- Purchase Request
- Outside Services
- Receive Parts
- Close

Report Out
- Turnaround time
- Hard Down/Soft Down
- PM Completion Rates
- Alert/Recall Completion
- Joint Commission Documents
- Radiation Safety
- Parts Traceability
Mobile Application

• Demonstration
  – Nurse reports issue to CEC
  – Tech is assigned work order
    • Locates device (CEID)
    • Repairs device
    • Completes work order

ENABLING AND EMPOWERING FIELD SERVICE ANYWHERE, ANYTIME THROUGHOUT THE HOSPITAL.
Critical Success Factors

1. Strategy and Requirements
   Support the business process with the solution (not the other way around)

2. Organizational Change / Communications
   Maintain clarity on the “what’s in it for me” for stakeholders

3. Governance
   Process and requirements definition by committee is never easy; listen but make a decision

FOCUS ON THE CORE MISSION: PATIENT SAFETY AND CUSTOMER SERVICE
Critical Success Factors

• Strategy and Requirements
  – Stakeholder identification
  – Business process improvement
  – Requirements definition
  – Agile-fall solution development
  – Phased deployment

Support the business process with the solution
(not the other way around)

FOCUS ON THE CORE MISSION: PATIENT SAFETY AND CUSTOMER SERVICE
Critical Success Factors

• Organizational Change and Communications
  – Regulatory
  – CEC
  – Site Managers
  – Field Service Technicians

Maintain clarity on “WIIFM" for stakeholders (through open, honest, frequent communications)

FOCUS ON THE CORE MISSION: PATIENT SAFETY AND CUSTOMER SERVICE
Critical Success Factors

• Governance
  – Executive-level sponsorship and support
  – Top-down oversight and strategic direction
  – Defined platform owner
  – Defined process owners
  – Timely decision making

Process and requirements definition by committee is never easy (listen to stakeholders but make a decision for the good of the order)

FOCUS ON THE CORE MISSION: PATIENT SAFETY AND CUSTOMER SERVICE
Projected Outcomes

1. Speed to market
2. Improved data quality
3. Increased customer satisfaction
Benefits of New Platform

**Availabilty**
Web-based application running in the cloud. No matter what network you are on, you will always be able to connect.

**Efficient**
Increased efficiency to the field by improving operation and field capabilities, overall performance and usability.

**Data Driven**
Delivering integrated Informatics and business intelligence for analytics, customer decision support, and other potential product offerings.

**Customer Portal**
Providing customers a web portal for requesting service, reporting data, and capturing KPIs.

**Standardization**
Pre-populated drop down lists, boxes to check, and fewer 'free text' fields.

**Reliability**
Providing a robust, stable, high performing browser-based medical equipment management platform with increased uptime.

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Top Takeaways

1. During initial rollout “keep it simple” – favor flexibility and training over managing every potential deviation from the ideal.

2. The breadth and depth of the ServiceNow® platform is enormous – define a strategic, phased implementation approach and plan.

3. Listen to and communicate with your stakeholders – they truly are a Critical Success Factor.
Q & A

DOUG FOLSOM
Chief Information Officer
TriMedx

MARTIN BURKE
President, Sales and Business Development
Integrated Solutions Management
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Thank You

Doug Folsom
Chief Information Officer
TriMedx