# Parkview Health Automates Event Management for a Smoother Process with Fewer Errors

**PARKVIEW HEALTH**

**Industry:**
Healthcare

**Geographies:**
Indiana and Ohio

**Employees:**
13,000

**Planview Products:**

Planview PPM Pro™

Planview Projectplace™

## CHALLENGE

Parkview Health's Advanced Medical Simulation Lab was using emails, phone calls and hallway conversations to schedule and handle incoming Simulation Lab requests. Outlook calendars proved inefficient and time-consuming in managing demand and the allocation of various resources.

## SOLUTION

The combination of Planview PPM Pro™ and Planview Projectplace™ gives Parkview Health a consolidated event management platform, replacing manual efforts with automation and customized dashboards. The Simulation Lab streamlined their entire process to achieve greater control and efficiencies.

"No more manual efforts, rescheduling or double-booking. PPM Pro and Projectplace have taken out the human factor, giving us a smoother process with fewer human errors."

– *Cortney Webb, Surgical Simulation Specialist & Coordinator, Parkview Health*

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## About Parkview Health

The Medical Simulation Lab at Parkview Mirro Center for Research and Innovation is a state-of-the-art facility featuring some of the most advanced medical simulation technology available today. Parkview Health provides advanced clinical training to physicians, clinical teams, and other healthcare professionals.

## Challenge: Efficiently Managing Requests and Resource Capacity

With no formal or standardized process to manage incoming simulation requests, the Lab resorted to emails, calls, and hallway conversations that were then relayed to Lab staff via emails, texts, or paper notes. To see availability of various resources at their many different locations, the team used Outlook calendars, opening each calendar event one by one to identify which staff members, manikins, and equipment were available, which ones were assigned to which events, and for what duration. There was no simple way to forecast or plan for availability, often leading to human error, such as double-bookings and rescheduling assets and events. Without any reporting on work status or resource availability, it was impossible for leadership to understand demand, utilization trends, or costs.

## Solution: A Single Solution to Visualize Demand, Capacity and Costs

The leadership teams at the Simulation Lab use Planview PPM Pro as an administrative, event management platform to allocate and manage resources, and the Lab staff uses Planview Projectplace as their online workspace. Leaders created a standard request form in PPM Pro that asks for all of the necessary information related to an event, eliminating manual intake altogether. They can now organize, match, and schedule incoming requests for an event with available resources in a single platform.

The leadership team is able to visualize the availability of all people and resources, including locations, trucks, trainers, single use items, manikins and equipment bags, for a deeper understanding of how effectively they are allocating these resources to various event requests. Customized templates and resource dashboards enable leadership to quickly plan and schedule events 60 days in advance with confidence.

"We have a lot of resources to keep track of, and we need to know where everything and everyone is at any given time," says Cortney Webb, Surgical Simulation specialist & coordinator at Parkview Health. "We couldn't manage it all effectively in Outlook, but with PPM Pro, everything is visible in customized reports where we can see each asset and availability at once."

Once leadership schedules events in PPM Pro, they assign work to staff in Projectplace, which is seamlessly integrated. Digital Kanban boards in Projectplace keep staff and leadership on the same page, providing an easy way to assign checklists and visualize work progress through its lifecycle. If projects are coming due, anyone on staff can complete the tasks and push the card to the completed column. It is easy for any stakeholder to see exactly where a project is at any given time, what is coming due, and what has been successfully completed.

Planview's reporting capabilities have proven highly beneficial for Parkview Health. "We assign a dollar amount to each of the resources we put into PPM Pro," explains Webb. "We generate an invoice based off of our actual hours and can see demand, which resources we assigned, and which ones were actually used to understand the total cost for each event. Other dashboards show resource allocations weeks ahead of time, weekly forecasts, outstanding tasks, and how well we are meeting demand. We have complete visibility into our costs, revenue, resources and work progress over time for better management and greater efficiencies."

## Results: Greater Insights and Efficiency with Fewer Errors

The Simulation Lab uses the integrated PPM Pro and Projectplace solutions as an event management platform, leveraging customized dashboards to provide insights into administration, operations, and work breakdown structure. The consolidated solution builds in consistency, efficiency, and transparency to help the Lab reliably deliver on its commitments. "The biggest takeaways for us have been the customized dashboards and reports that provide us with incredible insight," says Webb. "No more manual efforts, rescheduling or double-booking. PPM Pro and Projectplace have taken out the human factor, giving us a smoother process with fewer human errors. It has simplified everything we do and added significant value to my everyday workflow."

## Future: Spread the Word About the Benefits of a Consolidated Platform

The Simulation Lab plans to continue using both Planview solutions together to keep administration and work seamlessly connected. Currently, all departments in Parkview Health System use PPM Pro and approximately 1,000 people are using Projectplace to manage work in a transparent, collaborative way. The Lab intends to proactively share its experience with the rest of the organization, helping them realize the benefits of integrating the two systems into a consolidated platform.