



Overlake Medical Center & Clinics uses Smartsheet to drive strategic, physical, and digital transformation

Overlake Medical Center & Clinics is a nonprofit healthcare system based in Bellevue, Washington and serving thousands of people throughout the Puget Sound. The organization includes a 349-bed hospital and a growing network of primary, urgent and specialty care clinics. Led by a volunteer board of trustees, Overlake employs more than 3,400 people and has over 1,300 affiliated providers on its medical staff.



Customer:
Overlake Medical Center & Clinics

Industry:
Healthcare

Organization Size:
Medium (50-999 employees)

Region:
North America

Website:
overlakehospital.org



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Jeni Connelly, Sr. Project Manager Enterprise PMO at Overlake Medical Center & Clinics

Like many healthcare organizations, Overlake Medical Center & Clinics wanted to find new ways to thrive, sustain profitability, and efficiently serve patients after emerging from the pandemic. To support that goal, the hospital kicked off a series of strategic sustainability planning sessions. These sessions resulted in the creation of a five-year strategic, physical, and digital transformation plan designed to enhance patient care and bring advanced medical services to more residents in the Greater Seattle, Washington region.

Background

In one of the first steps in this transformation, the nonprofit healthcare system, which has served Bellevue, Washington for more than six decades, recently completed Project FutureCare, a large campus renewal project featuring a new 240,000 square-foot tower with a state-of-the-art Childbirth Center.

Smartsheet plays a major role in driving the organization's multifaceted transformation initiatives. *"Smartsheet is vital to what we do here, whether it's increasing sustainability, improving patient care, or supporting the physical transformation of our campus,"* says Jeni Connelly, Sr. Project Manager Enterprise PMO at Overlake. *"Smartsheet is like having hundreds of people behind the scenes, even though there are only a few of us on my team. It's one of our core applications."*

To drive their ambitious goals, Overlake recognized they also needed to transform how they got work done. *"We didn't have a good way to centrally manage projects,"* says Connelly, whose Enterprise PMO team was tasked by Overlake leadership with helping implement their transformation strategy. *"We used spreadsheets, email, and an ineffective web-based tool, and all projects were managed separately by different teams."* Because projects were managed in disparate silos, communication between teams was challenging, and there was a lack of visibility into how projects were impacting their ability to achieve strategic objectives. *"Our project portfolios were managed with multiple tools,"* she says. *"We realized we wouldn't be able to meet our strategic and sustainability goals with our existing applications and spreadsheets."*

Solution

While searching for a new foundational tool to enable their multi-year transformation, Connelly discovered the organization's strategy team was

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using Smartsheet. *"I quickly saw the benefits of this tool, and it became our main system for project and portfolio management, helping us get rid of spreadsheets and manual note-taking," she says. "The system was so easy to learn. You don't need to be a coder – anyone can go in and make a transformational change."*

To drive long-term sustainability, Overlake gathered all project information across the hospital in Smartsheet. By doing so, Overlake started to see common goals and could organize these projects into specific strategic programs. Ultimately, the hospital prioritized six long-term strategic objectives with many projects supporting each strategic goal. *"This helps us build a platform for strategic planning for the next 3-5 years,"* says Connelly.

To support its strategic plan, Overlake uses Smartsheet to manage these strategic programs end-to-end, from initiation to completion. Now, Connelly and the Enterprise PMO, as well as Overlake leadership can more efficiently plan and prioritize work for the next fiscal year by evaluating which of the 125 project categories and work streams will provide the highest return. *"This isn't just strategy – this is execution,"* Connelly says. *"We manage our portfolio in Smartsheet, but we also have a project plan for each project."*

Once a new project is kicked off, it is assigned to a specific team or department responsible for approving, tracking, and completing it. Each project in Smartsheet contains detailed timelines with budget and value tracking, in addition to other KPIs. To help steer the organization, the hospital's executives use Smartsheet dashboards to get a high-level view across all projects and programs.

With a lean team and lofty goals, Overlake uses workflow automation to ensure it is executing efficiently. Smartsheet automatically sends email reminders to ensure due dates aren't missed, with additional workflows in place to eliminate formerly manual tasks and processes that used to necessitate one-off emails. *"This supports our sustainability focus because it removed another application in my technology stack,"* says Connelly.

In a Nutshell:

Better visualization also means Overlake can quickly find resources for urgent projects like acquisitions.

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In addition to powering project-level efficiencies, Smartsheet is used to manage higher level programs, like the mergers and acquisitions process, which play a key role in the health system's inorganic growth plans. These projects have more urgent deadlines and require close collaboration across a range of functions. *"For these projects, we have to engage multiple teams, such as marketing, human resources, software, IT, and facilities,"* says Connelly. *"Smartsheet helps us collaborate and get to the finish line on time."* Connelly also uses Smartsheet to manage new clinic construction, collaborating with external partners to ensure key timelines are met.

A central hub for visualizing hundreds of projects

With Smartsheet, Overlake has centralized project and portfolio management and can connect and streamline work execution across the hospital. *"We now have one location for everyone to go find what they need,"* says Connelly. *"This greatly reduces the time it takes to store and find project data, so we're more efficient."* Smartsheet also gives stakeholders a real-time snapshot of budgets and costs. *"We're able to save significant dollars just by focusing and having everyone on the same system,"* says Connelly.

Because the hospital's leaders can quickly understand the health and progress against strategic priorities through dashboards, they can make more-informed executive decisions on which initiatives to prioritize, and where additional investment or attention is needed. *"Executives now have a way to visualize everything, instead of looking at different spreadsheets or paper notes,"* says Connelly. For example, Scott Waters, the hospital's chief information and technology officer, is the primary driver of Overlake's 5-year digital transformation and uses Smartsheet dashboards every day. *"Our ability to quickly build and iterate on our existing EPMO structure in Smartsheet was a critical component to our success with our sustainability plans in FY23,"* he says. *"We were able to plan, resource, track progress, and make data-driven decisions in real time. Our Smartsheet sustainability dashboard has become a focal point for our Executive Leadership Team meetings each week."*



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Better visualization also means Overlake can quickly find resources for urgent projects like acquisitions. *"In healthcare, we have to pivot very quickly, and Smartsheet helps us do that,"* Connelly says. *"Looking at Smartsheet, we can see what's in the pipeline in terms of available resources so we can make sure we meet a cutover deadline for an acquisition. This is critical, because clinics need to have minimal downtime while they continue to care for patients."*

Powering results beyond transformation

As Overlake continues its transformation, they also use Smartsheet to support patients and providers. On the clinical side, Smartsheet helps Overlake support a formal partnership with another local hospital, with physicians working between the two organizations. *"We took projects from physicians at both organizations and put them all into Smartsheet,"* says Connelly. *"Now, some physicians can look at a Smartsheet dashboard to quickly find a project and check its status."* This leads to increased efficiency.

With Smartsheet, providers have more time to focus on patient care. *"We've physically transformed our campus over the past seven years, and now we're taking on the digital and process transformation to support that,"* says Connelly. *"That includes the software enhancements that lead to a better experience for patients and providers. If we can give providers 15-20 minutes of their time back every day by automating processes in Smartsheet, that's time they can give to patients because they're not on their computers."*

Overall, *"Smartsheet helps us streamline projects that are critical to our digital transformation,"* says Connelly. *"As a result, we can focus more on patients and providers while bringing our medical center into the next era of modernization."*



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