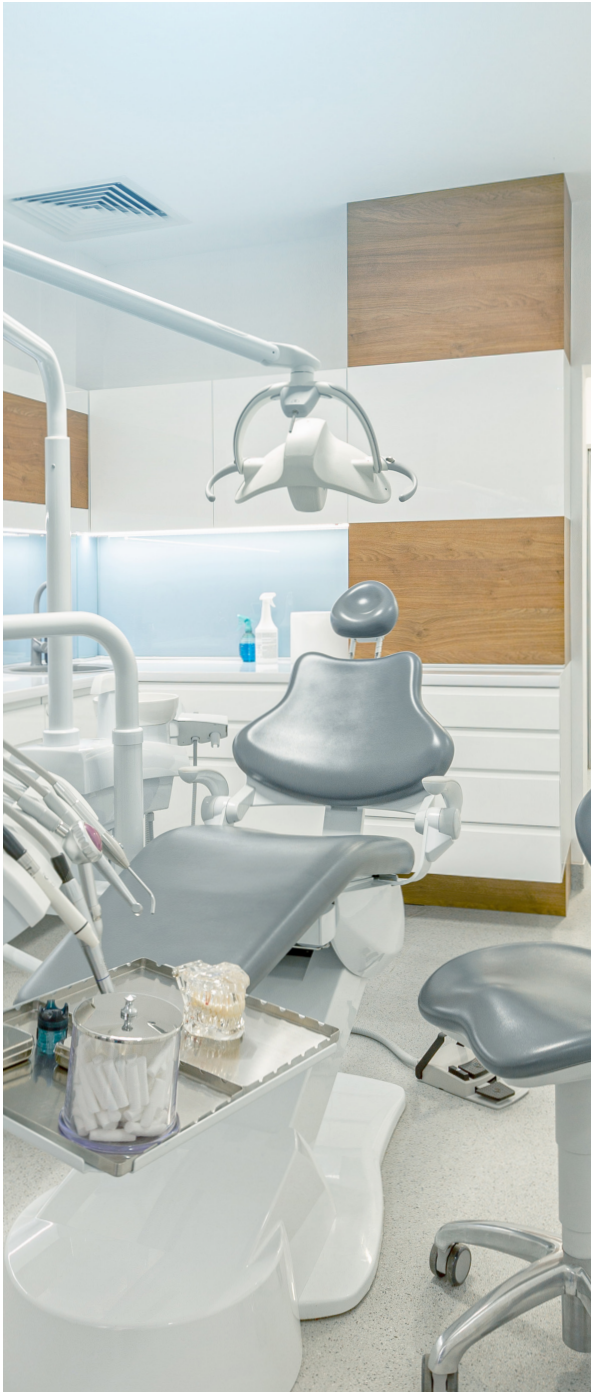




**Pacific Dental Services**

# How Oomnitza Helped PDS Take Control of Their Technology Environment, Manage Costs and Reduce Risk

**oomnitza**



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# 25%

Cost Savings  
Managing Assets

# 160

Hours Saved  
Per Month

# 30%

More Assets  
Discovered



**PACIFIC**  
DENTAL SERVICES®

## Executive Summary

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As one of the fastest growing private companies in the US, Pacific Dental Services struggled to manage their assets across a thousand dental offices due to lack of governance around asset management. They lacked comprehensive visibility into their 60,000 assets with no single source of truth or lifecycle management capabilities. This created issues related to forecasting, license compliance, security, on/offboarding and service delivery efficiency.

PDS decided to tackle these challenges with Oomnitza's Enterprise Technology Management solution because it went "beyond ITAM", didn't require another agent on their endpoints and provided a low-code/no-code platform.

With Oomnitza, PDS discovered 30% more endpoints than they thought they had. They use over 175 workflows to improve IT efficiency by automating processes pertaining to refresh forecasting, license compliance, security gap assessment, service desk efficiency and user experience, saving over 160 hours per month.

PDS has gone from relying on siloed, point-in-time databases that were out of date, to having eyes on everything. They are now able to manage the end-to-end lifecycle of hardware and software technology assets from procurement to disposal. Oomnitza has helped them improve asset utilization and reuse, curbing wasteful expenditure and achieving cost savings of over 25% from managing their technology assets.

# Technology Management Challenges Amidst Rapid Growth

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Founded in 1994, Pacific Dental Services is one of the fastest growing private companies in the US. They partner with dentists and clinicians to provide business and technology support to about a thousand dental practices across 24 states. Their rapid growth, coupled with a wide variety of technology, and 60,000 devices spread across a large number of locations, made technology management a daunting task.

Prior to deploying Oomnitza, the environment at PDS consisted of multiple management systems, different sources of truth and siloed asset management tools that could not be updated easily without massive manual effort. There was no way to understand whether assets were still there or not, their current location and usage, and no way for accounting to easily reconcile against their fixed assets module. This lack of governance around asset management created a host of challenges.

## Lack of Visibility into Assets

Despite utilizing some legacy hardware and software asset management tools, PDS were unable to correlate all the data about their technology assets in one place. Depending on the tool they would look at, they got totally different views and results. The results varied depending on whether devices were online, offline, on-prem, remote, as well as other characteristics that were ever-changing in today's dynamic environments. They needed something that could give them true visibility of their technology assets irrespective of these dynamics.

## Challenges

Pacific Dental Services (PDS) struggled with lack of governance around asset management, resulting in:

- Lack of holistic visibility into their 60,000 assets with no single source of truth
- Inability to monitor the state and manage the lifecycle of assets from procurement to disposal
- Guesswork forecasting for refreshes and software renewals leading to wasted expenditure
- Security exposures due to agent coverage gaps and end-of-life OSEs and applications

“Before Oomnitza, we really didn’t have clear visibility into our assets. We used different tools and were not able to correlate all the data about our assets in one place. Depending upon what tool we were looking at, we got a totally different view, a totally different result.”

**Nemi George,**  
VP, Information Security  
Officer and IT Operations  
*Pacific Dental Services*

## Inadequate Lifecycle Management

PDS had a point-in-time approach to managing assets. When new offices opened, devices were assigned to it and recorded in a static database. They didn’t have the processes and technology to update the state, location, users, and other attributes of assets over time. Assets were purchased in bulk and assigned, without any ability to monitor how they were transferred and used by different entities and locations within their business. They weren’t able to track upcoming end-of-warranty or end-of-life dates for business planning.

## Inaccurate Forecasting and Budgeting

Forecasting in the past was a big estimation game. Without adequate asset lifecycle management, PDS had no ability to understand which devices were reaching their end-of-life dates, which needed to be swapped out and which could be reused in other offices or entities. On the software side, they weren’t able to get a clear picture of what they had installed vs. licensed, allocation of licenses across locations and usage metrics. As a result, they used best guess efforts for refresh forecasting, software renewals and budgeting.

## Security and Compliance Issues

PDS didn’t have the ability to monitor their assets, not just from an accounting perspective, but also from a security standpoint. They didn’t have up-to-date information about asset state, what OS version and applications they were running, and whether they were still using any devices, OS and application versions that were reaching their end of support life. They had no way to ensure that their endpoint agents were installed, up-to-date, correctly configured and running on all devices, creating security exposures and compliance gaps.



# Modernizing Operations with Enterprise Technology Management

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PDS decided that they needed a modern approach to asset management to address their multiple use cases - from visibility and lifecycle management to improved procurement forecasting, security, IT service efficiency and user experience.

They were attracted to Oomnitza's Enterprise Technology Management solution because it went "beyond ITAM". In addition to asset visibility and inventory management capabilities, Oomnitza provided the capabilities to automate IT workflows for license compliance, security gap assessment, technology lifecycle management, refresh forecasting and more.

A standout capability of Oomnitza was not requiring another agent on their endpoints. This was especially important in an environment with a mix of IT and clinical devices, where some devices just can't take an agent or don't have enough resources for additional agents. Using Oomnitza's agentless approach and out-of-the-box integrations, PDS is able to correlate data from their existing endpoint management and security tools such as Jamf, SCCM, Tanium and more, into a single system of record. They are able to get a full picture of their technology environment, generate the reports they need, and run workflows on top of this single source of truth.

Another differentiator that PDS liked is Oomnitza's low-code/no-code platform. Unlike some other solutions that require engineer-level resources to build workflows and customize the platform, PDS is able to use the 1500+ built-in presets and the drag-n-drop interface to quickly configure Oomnitza for their environment and automate processes. It's easy to get started and achieve tangible outcomes rapidly, yet provides them with the flexibility to extend the tool with custom fields and workflows as they delve into more advanced use cases.

Once PDS deployed Oomnitza, they discovered 30% more endpoints than what they thought they had. Oomnitza now manages over 60,000 technology assets across a thousand PDS locations - from end-user laptops, desktops, tablets and mobile devices to servers, access points, switches, virtual machines, payment devices and more. They use over 175 workflows to automate processes pertaining to refresh forecasting, software license compliance and renewals, security, service desk efficiency and user experience.

"The biggest benefit we derive from Oomnitza is lifecycle management - understanding assets from purchase all the way to decommissioning. Forecasting for refreshes and renewals in the past was a big estimation game. Now, we're able to accurately predict what we need to refresh and renew next year and even plan 5 years down the line."

**Nemi George,**  
VP, Information Security  
Officer and IT Operations  
*Pacific Dental Services*

# Game-Changing Outcomes

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PDS went from relying on siloed, point-in-time databases that were out of date, to having eyes on everything. They are now able to manage the end-to-end lifecycle of hardware and software technology assets from procurement to disposal. Oomnitza has helped them improve asset utilization and reuse, curbing wasteful expenditure and achieving cost savings of over 25% from managing their technology assets. PDS has also improved IT efficiency by automating tasks pertaining to forecasting, security, compliance and offboarding, saving over 160 hours per month.

## Precise Refresh Forecasting and Budgeting

Oomnitza has been a game changer for PDS in managing the procurement to refresh asset lifecycle. With up-to-date information about end-of-warranty and end-of-life dates, they are able to time their refreshes effectively, forecast accurately for next year and create 5yr plans. Managing scenarios such as the upcoming Windows 10 end-of-support life has gone from being a chaotic exercise to a breeze. They are also able to relate this information to their accounting fixed assets and understand the depreciation cycle and financial impact.

## Software Management and License Compliance

With Oomnitza, PDS is also managing the lifecycle of their desktop software and SaaS more effectively. They have complete insight into which endpoints/users have software installed, license allocation and usage across locations, and installed vs. licensed metrics. There is no guesswork or manual effort required when their software vendors request license audits - they are able to provide reports directly from Oomnitza that show usage vs. licensed metrics. Oomnitza has helped them streamline their renewals and true-ups immensely.

## Security Coverage Gaps and Controls Assessment

Another distinct advantage PDS gets from Oomnitza's agentless architecture is to use it as a security validation tool. Oomnitza serves as a gatekeeper to make sure that the suite of security agents they want deployed across their environment are actually deployed, are running the correct version, have the most recent security updates installed and are correctly configured and communicating with their management platforms. This enables them to identify coverage gaps and remediate issues in a timely manner.

## Outcomes

With Oomnitza's modern approach to enterprise technology management, PDS was able to:

- Achieve 25% cost savings from managing the lifecycle of all assets across a thousand locations
- Discover 30% more endpoints than they expected and improve forecasting and budgeting
- Identify agent coverage gaps and remediate security issues in a timely manner
- Improve service delivery efficiency and user experience while saving over 160 hours per month

“Oomnitza’s approach of being agentless has allowed us to pull data from multiple sources and leverage all the agents that we already have in a clinical environment, instead of having to deploy an additional agent. We’re able to correlate all this information into one tool and get the reports we need for procurement, security, compliance and even tax regulations.”

**Logan Cook,**  
Senior Manager, IT Asset  
Management and Procurement  
*Pacific Dental Services*

## Service Desk and User Experience Improvement

PDS uses the integration between Oomnitza and Fresh Service to improve service delivery efficiency and user experience. Their service desk technicians are able to get a user’s asset information at their fingertips, understand device and software specifications, and reduce back and forth questions with end users to investigate and triage issues. They can also get insight into past issues for each asset and make appropriate resolution decisions so that end users can focus on their work instead of being impacted by delays.

## Improved Endpoint Recovery During Offboarding

Oomnitza has been instrumental in helping PDS significantly improve their recovery rates for assets during employee offboarding. Oomnitza’s integration with Workday enables them to get a complete report on equipment to be recovered when employees depart. The workflow automations streamline tasks to be completed by different teams for asset recovery. With Oomnitza’s new survey feature, PDS is implementing a new process for end users to acknowledge receiving assets which will further assist IT, HR and legal in asset recovery.

## Establishing the Foundation for Audit Compliance

As part of their journey into offering medical services, PDS is preparing for stricter audit certifications starting in 2024 - compliance with HIPAA, ISO 27001 and healthcare IT mandates. At the heart of all these frameworks is a solid understanding of hardware and software assets - endpoints, OSes and applications running in the environment, legacy systems and upcoming end-of-life dates. PDS will use Oomnitza for these inventory controls, a core part of their compliance and certification efforts.



## Third party tools

- Jamf for apple device management
- SCCM for endpoint management
- Tanium for endpoint security
- Workday for HR management
- Freshservice for service management and ticketing

## About Pacific Dental Services

Pacific Dental Services is a national dental services organization (DSO) that provides business and technology support to about a thousand dental offices in 24 states. They have pioneered the concept of modern dentistry to equip dentists with the latest proven technology, the best operational practices and procedures, and highly skilled support staff. This allows PDS-supported dentists the ability to focus on doing dentistry and providing patients the best experience. PDS has been on the Inc. 5000 list of the fastest growing private companies in America 14 times, exceeding cumulative revenues of over \$2 Billion in 2022. The essence of their business model is simple: enabling clinicians to focus more on the patient and worry less about the business.

