



From Guesswork to Governance:

How PDS Took Control of Their IT Assets with Oomnitza

25%

Cost Savings Managing Assets

160

Hours Saved Per Month

30%

More Assets Discovered



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 & IT Operations
Pacific Dental Services

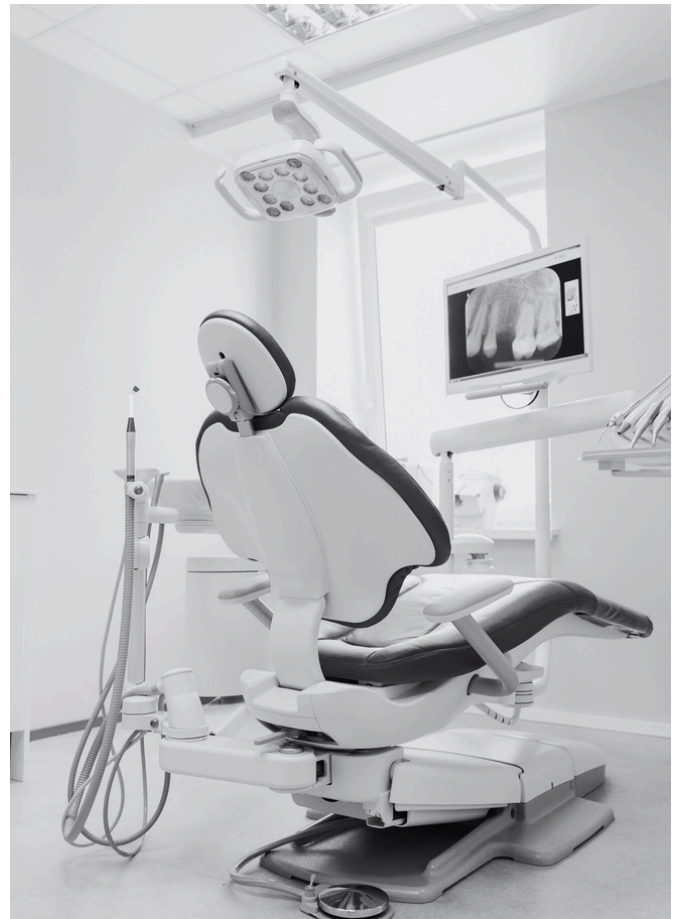
Business Profile

- **Industry**
Healthcare
- **Employees**
10,000+
- **Annual Revenue**
\$2 billion (2022)
- **Endpoints**
60,000
- **Locations**
1,000 dental offices

About Pacific Dental Services (PDS)

Pacific Dental Services is a national dental services organization 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.



From Siloed Databases to Eyes on Everything

As one of the fastest growing private companies in the U.S., Pacific Dental was looking for a way to increase governance around asset management for nearly 1,000 dental offices. They needed a way to gain an accurate, comprehensive view into their 60,000 assets and establish a single source of truth. Without stronger lifecycle management capabilities, they couldn't proactively combat issues related to forecasting, license compliance, security on/offboarding, and service delivery efficiency.

PDS decided to tackle their challenges with Oomnitza's modern IT asset management (ITAM) 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 used 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.

They have 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. By using Oomnitza, PDS has improved asset utilization and reuse, curbing wasteful spending and achieving cost savings of over 25% from managing their technology assets.

Navigating the Challenges of Technology Management During Hyper Growth

Founded in 1994, Pacific Dental Services partners with dentists and clinicians to provide business and technology support to nearly 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 or know their current location and usage. On top of that, accounting still needed a way to easily reconcile against their fixed assets module. This lack of governance around asset management created a host of challenges.

A Lack of Visibility into Assets

Despite utilizing some legacy hardware and software asset management tools, PDS still needed a way to correlate all the data about their technology assets in one place. Each tool delivered totally different views and results, depending on whether devices were online, offline, on-prem, or remote, as well as other characteristics that were ever-changing in today's dynamic environments. They needed a solution that could give them true visibility of their technology assets irrespective of these dynamics.

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.



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 & IT Operations
Pacific Dental Services



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. This left PDS without a way 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. PDS saw an opportunity to better understand device status—identifying which assets were approaching end-of-life, which were candidates for refresh, and which could be reused across offices or business entities.

On the software side, they wanted to gain a clear picture on what they had installed vs. licensed, and further breakdown license allocation across locations, and usage trends to access more accurate forecasting, streamlined renewals, and more informed budgeting decisions—instead of relying on best guess efforts like they previously depended on.

Security and Compliance Issues

PDS needed a way to monitor their assets, not just from an accounting perspective, but also from a security standpoint. As it stood, 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 also sought to ensure that their endpoint agents were installed, up-to-date, correctly configured and running on all devices, creating security exposures and compliance gaps.



Challenges

PDS wanted to elevate their asset management strategy for increased visibility and control. By improving their governance, they aimed to:

- Establish a single source of truth and gain a comprehensive, holistic view of their 60,000 assets
- Enable end-to-end lifecycle management, from forecasting to disposal
- Transition from a guesswork approach to data-driven model, optimizing spend and reducing waste
- Strengthen security to cover the exposure gaps left by agents and end-of-life OSes and applications

Modernizing Operations with Object-Centric Asset Management

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 Modern ITAM 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.

Oomnitza also didn't require another agent on their endpoints—a standout benefit compared to other providers. 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 was able to correlate data from their existing endpoint management and security tools, such as Jamf, SCCM, and Tanium, into a single system of record. They could get a full picture of their technology environment, generate the reports they need, and run workflows on top of this single source of truth.

Pacific Dental Services also loved 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-and-drop interface to quickly configure Oomnitza for their environment and automate processes.

It was easy to get started and achieve tangible outcomes rapidly, yet provided them with the flexibility to extend the tool with custom fields and workflows as they delved into more advanced use cases.

Once PDS deployed Oomnitza, they discovered 30% more endpoints than what they thought they had. Oomnitza now manages their 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.



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 & Procurement
Pacific Dental Services

Game-Changing Outcomes

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.

They've utilized Oomnitza to 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

PDS has transformed its procurement-to-refresh asset lifecycle management with Oomnitza. 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 5-year 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.

Security Coverage Gaps and Controls Assessment

PDS is also able to distinctly use Oomnitza's agentless architecture as a security validation tool.

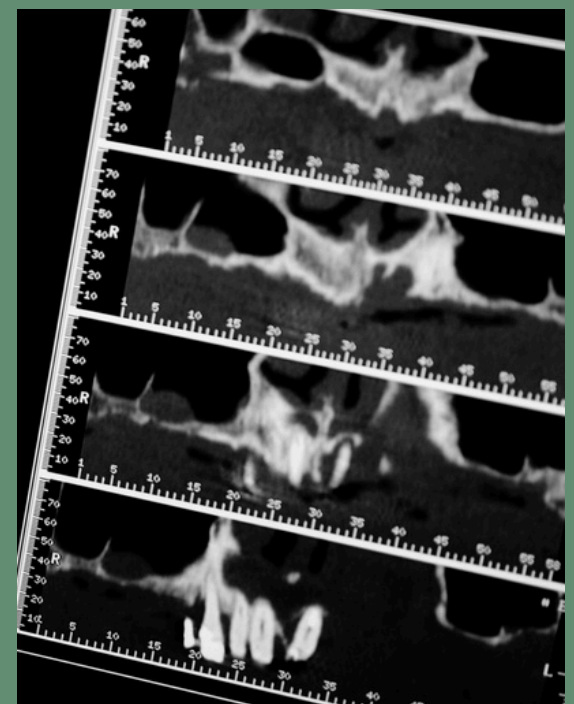
Oomnitza serves as a gatekeeper to make sure that the suite of security agents they want deployed across their environment are actually deployed, running the correct



The Outcomes

With Oomnitza's modern IT asset management solution 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**



configuration, communicating with their management platforms, and are protected by the most recent security updates installed. This enables them to identify coverage gaps and remediate issues in a timely manner.

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, and the workflow automations streamline tasks to be completed by different teams for asset recovery.

With Oomnitza's 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.

Service Desk and User Experience Improvement

PDS now uses the integration between Oomnitza and Freshservice 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.

Establishing the Foundation for Audit Compliance

As part of their journey into offering medical services, PDS is preparing for stricter audit certifications, such as 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. Oomnitza acts as a core part of PDS's compliance and certification efforts, providing inventory control.

Software Management and License Compliance

With Oomnitza, PDS is managing the lifecycle of their desktop software and SaaS more effectively. They have complete insight into which endpoints and 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.



With Oomnitza, we went from not knowing where everything was or what everything was, to actually having eyes on all assets. After deployment, we ended up discovering about 30% more assets that we didn't know were in our environment. This visibility is priceless.

Logan Cook

Senior Manager, IT Asset Management & Procurement
Pacific Dental Services



Learn more at oomnitza.com

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