



Solutions & Success

The Inside Story

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Kraft Technology Group Shows This Medical Practice How to Save Money On IT

Heritage Medical Associates is an independent multi-speciality practice operating out of Davidson, Wilson and Williamson counties. Incorporating 160 providers, Heritage Medical Association has been in business for 28 years.

They are currently the largest multi-speciality, privately-owned practice in middle Tennessee, and they take pride in their independence. Their patients and partners value working with Heritage because they know they're physician-owned and physician-led.

This Medical Practice Needed A Second Opinion On Their IT

Kenny Caldwell, CFO, was worried about Heritage Medical Associates.

Were they spending too much money on IT?

Could they be achieving the same results with more cost-effective hardware?

What opportunities for improvement was he overlooking?

These are the ongoing concerns of a good CFO. In his time with Heritage Medical Associates, he's always been looking for ways to lower their expenses, while maintaining or improving the value each dollar brings them.

However, Kenny is not an expert in all areas of Heritage Medical Associates' business, and he shouldn't have to be.

As a multi-speciality, multi-location practice in operation for 28 years, it's a complicated organization with a lot of moving parts.

Kenny doesn't need to know how everything works in minute detail - he just has to know how to judge the value they bring to the organization.

This process became especially important during the pandemic.

Now more than ever, Kenny needed to cut costs where possible, without lowering Heritage Medical Associates' quality of care. This includes their IT, which had become a greater expense in recent years.

"During COVID, we were really taking a much closer look at all of our spend, and IT spend was one area where we had noticed an increase," says Kenny. "We wanted someone to come in, and take a look at really everything, from our governance to our policies, to look at our software and hardware, and our network infrastructure."

After nearly three decades in business, it was important for Heritage to get an expert perspective on how their IT environment is operating. Kenny, like many CFOs, isn't an IT expert, and wouldn't expect himself to be able to assess the effectiveness and value of their IT systems.

Furthermore, he couldn't ask his internal IT staff of 12 employees to do it either. He needed a fresh set of eyes to give him an unbiased second opinion.

"We felt like we had to get someone a little bit more unbiased, that didn't know the system as well, to come in and take a look," says Kenny.



That's When Heritage Called Us

"Kraft Technology came highly recommended," says Kenny. "I had asked for a recommendation on a technology consultant that could come in, and just sort of take a look at our IT infrastructure. I reached out for a proposal which they provided and we moved forward from there."

Thanks to a recommendation from a long-time contact at KraftCPAs, Kenny was put in touch with our team. He had used other IT providers in the past, but gave Kraft a chance based on the glowing review provided by a trusted colleague.

"We wanted them to come through and walk through our data center and go through our different systems and see what equipment was at each of our locations, and then provide us with some recommendations, hopefully, to help us save some money," says Kenny.

Kraft Showed This Medical Practice How To Save Money On Their IT

"I think, at least having the insight of knowing that there are other systems out there that will probably get done what needs to be done at a lower cost is going to be a value to Heritage," says Kenny.

Our team conducted a thorough review of all of Heritage Medical Associates' IT systems and processes:

- **Expert Analysis:** After a preliminary meeting to better understand how they use their systems, our highly trained technicians comprehensively assessed their business' system, looking for strengths, weaknesses and opportunities for improvement.
- **Detailed Review:** After carefully completing the assessment process, we developed an in-depth report of our findings. In reviewing the assessment's results with them point by point, we provided Kenny and Heritage Medical Associates with all the critical information needed to better use and, if necessary, improve their IT systems and spending.

Thanks to our review, Kenny now has a better understanding of the value Heritage Medical Associates is getting from the money they spend on IT. He's even learned of a few ways in which they can save money.

"There's no doubt that we have the opportunity to save some money by going to some generic IT equipment, rather than the top of the line equipment that we currently have," says Kenny. "You know, generic servers instead of top of the line Cisco servers, and generic laptops to run our EHR software. If you're able to save \$750 or more on a generic laptop, and basically get the same lifespan out of that laptop, maybe a year less, that's a significant savings."

Kraft Never Tried To Upsell This Medical Practice

One of the most common reasons for which businesses avoid third-party reviews like this one is that they're worried the IT company will use it as an opportunity to get new clients. In the course of the review, they'll constantly try to convince the company to fire its internal IT department and replace it with the IT company.

That's not the way Kraft operates.

"One of the things I appreciate about Kraft is that this wasn't a sales pitch," says Kenny. "They came in and sort of took a look at everything. It never turned into them selling services."

All Kenny wanted was an independent review, and that's what Kraft delivered. Heritage Medical Associates is confident in their IT team, and wasn't looking to replace them.

"We know that we have top-notch employees, but sometimes you can grow a little stale, and you're living in your own world," says Kenny. "To have someone that's an expert, that can come in from an outside organization, that has seen other systems is extremely valuable."

This Medical Practice Has The Info They Need To Improve Their IT

With the comprehensive report assessment prepared by Kraft, Kenny now has the exact information he needs to develop a more cost-effective IT environment. He can take that info to Heritage Medical Associates' board and help them make an informed decision about the future of their IT environment, maintaining their quality of care while saving some money in the process.