



**TALBERT**  
**MEDICAL**  
**GROUP**

## TALBERT Medical Group

Deployment of a New Accounting Solution to Streamline Business Processes for Clinics

# Medical Group Deploys New Accounting Solution, Streamlines Business Processes

## Situation

## Solution

## Benefits

*“Microsoft Great Plains was easy to deploy and customize for our business needs. Implementation went very fast.”*

*Michael Gam, Chief Financial Officer, Talbert Medical Group*

California-based Talbert Medical Group is a physician-owned primary-care medical group. The company maintains its headquarters in Costa Mesa, California, and operates nine clinics in the region. To manage its accounting, the company used a SAP-based accounting service. But the service’s costly and ineffective reporting, together with a provider-imposed service deadline (the solution provider was phasing out the service), led the group to seek a new accounting solution. Talbert Medical Group turned to a Microsoft® Gold Certified Partner, Technology Management Consultants (TMC), for help. In three months, Talbert Medical, with help from TMC, replaced the old system with Microsoft® Business Solutions–Great Plains®. After deployment, the company gained an effective solution it can host internally, improved its reporting, streamlined its business processes, and reduced costs by 40 percent.

Customer Profile	Business Situation	Solution	Benefits
Founded in 1975, Talbert Medical Group is a doctor-owned facility that provides healthcare services through nine clinics located in California’s Los Angeles and Orange counties.	The company’s SAP-hosted accounting service was expensive, relied on manual processes, couldn’t generate detailed reports, and was being phased out.	The company brought its accounting in-house by deploying MS® Business Solutions–Great Plains® and MS® SQL Server™ 2000. MS Business Solutions for Analytics–Professional generates detailed reports.	<ul style="list-style-type: none"> <li>■ Deployed the new solution in three months</li> <li>■ Gained a less expensive and more robust accounting solution</li> <li>■ Improved reporting</li> <li>■ Automated purchase orders</li> <li>■ Poised for future growth</li> </ul>

## Situation

With headquarters in Costa Mesa, California, Talbert Medical Group is a physician-owned primary care and multispecialty medical group that serves nine locations across California's Los Angeles and Orange counties. The company has been in existence for more than 30 years.

Talbert Medical owns nine clinics that vary in size from 200 employees and physicians to 10. Each clinic submits detailed data to the corporate office every month, data that includes the number of patients treated and their related health insurance claims. Doctors' salaries are based on the annual total of their patients' insurance claims, which can fluctuate by thousands of dollars each month. In addition, the corporate headquarters maintains relationships with its suppliers by issuing purchase orders for equipment. To manage these activities, the accounting department had been using an SAP-based solution hosted by a third party.

**"An appealing feature of Microsoft Great Plains is that it's easier to generate reports than it was with SAP."**

Michael Gam, Chief Financial Officer, Talbert Medical Group

When the solution provider announced that it was ending its SAP-based plan, Talbert Medical Group knew it needed to find another solution to manage its accounts. At the same time, the group identified some key requirements of the new solution. First, it wanted a package it could host internally to reduce costs. Second, it needed more detailed reports that could be sent to the outlying clinics. Third, the company needed

a solution that would integrate with the Microsoft® Excel® 2000 spreadsheet software that it already used. And, perhaps most importantly, it required a solution that could be deployed and fully functional within three months—the deadline for migrating from the old solution.

## Solution

Talbert Medical Group already knew which solution they wanted: Microsoft Business Solutions–Great Plains®. According to Michael Gam, Chief Financial Officer for Talbert Medical Group, "We wanted a Microsoft solution to integrate with our existing Microsoft infrastructure, and Great Plains was competitive on pricing and offered the features we needed." After Talbert Medical made the decision, the company turned to a Microsoft Gold Certified Partner, Technology Management Consultants (TMC), for help.

Working with TMC, the company deployed Microsoft Great Plains within the three-month time limit. The solution also uses Microsoft SQL Server™ 2000 to store its data. The completed deployment provides Talbert Medical Group with an end-to-end solution that is hosted and maintained internally.

Today, the 10-person accounting team uses Microsoft Great Plains for all its accounting needs. After physicians submit their reports and data—often using Excel 2000 spreadsheets—the information is automatically imported into Microsoft Great Plains. In addition, the company is using Microsoft Business Solutions for Analytics–FRx® Professional to generate detailed reports.

## Benefits

Because the SAP-based solution was so costly, deploying Microsoft Great Plains was an economical alternative. And although Talbert Medical Group estimates that the new solution will pay for itself within one-and-a-half years, the benefits far exceed the initial return on investment.

### **DEPLOYED THE NEW SOLUTION IN THREE MONTHS**

For Talbert Medical Group, one of the deployment's big successes was porting all existing data and starting to use the new solution within three months—the deadline for when the hosted service went down. "Microsoft Great Plains was easy to deploy and customize for our business needs," says Gam. "Implementation went very fast."

### **GAINED A LESS EXPENSIVE AND MORE ROBUST ACCOUNTING SOLUTION**

Talbert Medical Group is pleased with the features found in Microsoft Great Plains and has determined that the new solution is as functional as, and perhaps more functional than, the previous SAP-based service. At the same time, the company is saving 40 percent over what it was paying before. "Microsoft Great Plains was the perfect solution for us moving forward," says Gam.

"We wanted a Microsoft solution to integrate with our existing Microsoft infrastructure, and Great Plains was competitive on pricing and offered the features we needed."

Michael Gam, Chief Financial Officer, Talbert Medical Group

## **IMPROVED REPORTING**

Under the old solution, when members of the accounting team wanted to run a report, they had to re-enter the information into a spreadsheet—a process that was so cumbersome and wasted so much time that the team ran only reports that were critical to the operation of the business. By using Microsoft FRx, however, Talbert Medical can now run reports quickly and easily, and individual clinics can view reports on a monthly basis. In addition, this product enabled the company to improve its month-end closing cycle by five days. “An appealing feature of Microsoft Great Plains is that it’s easier to generate reports than it was with SAP,” says Gam. “With Microsoft FRx, we can send an update to the clinics, and they can get the information they need.”

The new solution also automates part of the reporting process, providing up-to-date data and ensuring timely reports that reflect the current state of the business. In addition, the company can now run custom reports as needed. “With Microsoft Great Plains, reporting is amazingly available and accurate,” says Gam. “The reporting capability of Microsoft FRx is more flexible than any other software solution out there.”

## **AUTOMATED PURCHASE ORDERS**

In the past, Talbert Medical had to manually create and track purchase orders—again, by using spreadsheets—a process that wasted time and was prone to error. Using Microsoft Great Plains, the company has now automated how it creates and manages purchase orders. “Previously, our purchase order logs were manually kept,” says Gam. “With Microsoft Great Plains, we’ve automated all of them. I cannot even begin to estimate the efficiencies gained.”

Automating purchase orders has also reduced the amount of paper the company uses and the administrative costs for managing paper files.

## **POISED FOR FUTURE GROWTH**

By implementing a solution based on Microsoft technology, Talbert Medical Group is poised for future growth. Although the company plans to deploy additional modules, it now has a solid platform on which to grow. For example, the company uses Epic software to manage its patient billing and is thinking about integrating Epic with Microsoft Great Plains.

## Microsoft Business Solutions

Microsoft Business Solutions offer integrated business applications and services that allow small and midsize organizations, and divisions of large enterprises to connect employees, customers, and suppliers for improved efficiency. The financial management, customer relationship management, supply chain management, and analytics applications work with other Microsoft software, including the Microsoft Office System and the Windows® operating system, to streamline processes across an entire organization. This gives businesses insight to respond rapidly, plan strategically, and execute quickly. Microsoft Business Solutions are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company's needs.

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