



CASE STUDY: **DRIVING** **OPERATIONAL** **EFFICIENCY** **THROUGH IT** **LEADERSHIP**

HOW HARTMAN HELPED A
SENIOR LIVING MANAGEMENT
ORGANIZATION ACHIEVE
SUBSTANTIAL COST SAVINGS,
WHILE SIMPLIFYING VENDOR
MANAGEMENT AND IMPROVING
SERVICE QUALITY AND
ACCOUNTABILITY.





OVERVIEW & CHALLENGES

Coordinated Services Management (CSM), a senior living management organization supporting 21 locations and a corporate office, faced a highly fragmented IT environment. Each location operated independently, managing its own technology vendors and systems. This resulted in seven separate managed service provider (MSP) contracts, 21 Microsoft licenses, and multiple financial and EHR platforms.

Without centralized IT leadership or governance, the organization lacked accountability, standardized policies, unified systems, and strategic oversight. This decentralized approach created significant inefficiencies, inflated costs, and introduced business risk, particularly with inconsistent vendor management and no unified security posture.

Additionally, the absence of an IT leader at the corporate level meant that technology decisions were reactive rather than strategic, limiting scalability and innovation. To address these challenges and guide the organization toward a more strategic technology approach, CSM engaged Hartman to provide expert IT leadership and support the business goals by transitioning to a centralized model.

SOLUTION

Hartman partnered with CSM to implement a comprehensive IT leadership strategy. Acting as CSM's fractional CIO, we guided the organization through a structured change management process. Our first step was to separate IT leadership from the MSP selection, ensuring unbiased recommendations and accountability. We consolidated 21 Microsoft licenses into a single corporate agreement, reducing complexity and cost. MSP contracts were streamlined from seven to two, strategically aligned by region to provide better coverage and 24/7 support. Beyond vendor consolidation, we centralized technology governance, introduced accountability for IT service delivery, and advised on one financial system selection to unify operations. These initiatives created a scalable roadmap for future growth, improved operational efficiency, reduced operating costs, and positioned CSM to leverage technology as a strategic asset rather than a fragmented necessity.

IMPACT AND ROI

The transformation delivered measurable and long-term benefits. Consolidating Microsoft licenses and reducing MSP contracts generated substantial cost savings, while simplifying vendor management improved service quality and accountability. The ROI was significant, factoring in reduced licensing fees, streamlined contracts, and operational efficiencies across all locations. Beyond financial gains, CSM achieved centralized IT oversight, mitigating business risk and enabling consistent technology standards. This shift not only improved staff and resident satisfaction but also positioned the organization for future scalability and innovation. By moving from a decentralized, reactive model to a centralized, strategic approach, CSM now operates with greater efficiency, resilience, data reliability, and confidence in its technology investments.

TESTIMONIAL

“Three years ago, our organization was supported by multiple regional IT vendors with scattered procedures and very little consistency. We first connected with Hartman in the final stages of a haphazard RFP process to select a centralized IT MSP. Their team quickly helped us get organized, got the RFP on track, and streamlined the evaluation process, which allowed us to make a strategic and thorough decision.

Once we secured the IT MSP selection, Hartman formulated our IT leadership team and used their expertise to walk us through establishing foundational IT governance. Over the last three years, Hartman has helped us complete dozens of IT projects and gave us the guidance to establish standards and a scalable baseline for the information technology that supports our business.

We have excellent and consistent support from our Hartman IT Director and Chief Information Officer, and I cannot speak highly enough of them.”

Jordan Pegram

Director of Business Administration



CSM Senior Living
Management