

CASE STUDY: The Medical Society of Delaware

Strengthening IT Security, Stability, and Strategic Direction

Disclaimer: No compensation was provided to The Medical Society of Delaware for this case study and testimonial.

Overview

The Medical Society of Delaware (MSD) is one of the nation's oldest medical organizations and a trusted advocate for physicians and the communities they serve. Its mission is to guide, serve, and support Delaware physicians while promoting the practice and profession of medicine to enhance community health.

MSD plays a critical role in representing and defending the interests of physicians and patients in government, advising policymakers on medical issues, and equipping its members with the tools needed to stay current with laws and regulations shaping healthcare.

Challenges

MSD manages a broad set of responsibilities, including communications, health system innovation, physician relations and professional education, member services, legislative advocacy, regulatory guidance, and community health initiatives. With a lean internal team supporting these mission-critical functions, operational stability and security were essential. Prior to partnering with Sourcepass (formerly SSD Technology Partners), MSD needed:

- **Consistent support** to reduce recurring issues and minimize disruption to member-facing work.
- **Clearer visibility** into ticket trends and root causes.
- **Guidance** navigating Microsoft and Adobe licensing changes, renewals, and budget planning.
- **Stronger security** practices and alignment with compliance expectations.
- **A strategic partner** who could help them prioritize projects and modernize infrastructure while balancing multiple internal roles.

As the organization continued moving toward cloud-based systems and modern technologies, a reliable, long-term partner became essential.

"Sourcepass has been an incredibly reliable partner for nearly a decade. Their team guided us through major transitions—including moving fully remote overnight, migrating to the cloud, and modernizing our entire environment—with patience, clarity, and true expertise. We handle sensitive medical information, and Sourcepass has consistently kept us secure, stable, and confident in our operations."

— **Mike Miller**
Director, Finance & Human Resources



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**SOC 2
TYPE II
CERTIFIED**



Sourcepass employed a structured, consultative approach to assess MSD's environment, identify gaps, and define solutions that aligned with both immediate operational needs and long-term strategic goals.

Our Approach

- ➲ **Needs Assessment & Strategic Planning:** Conducted multi-year technology assessments to understand current systems, compliance requirements, staff workflows, and future goals.
- ➲ **Prioritization & Roadmapping:** Developed a roadmap that aligned initiatives with MSD's mission, core values, and budget, allowing leadership to focus on critical projects without overextending resources.
- ➲ **Governance & Transparency:** Defined clear roles, responsibilities, and expectations through a Master Services Agreement, Statements of Work, and recurring touchpoints.
- ➲ **Stakeholder Alignment:** Worked closely with leadership to translate technical options into plain language and actionable decisions.

This approach ensured MSD had clarity, confidence, and context for every technology decision while providing a framework to implement solutions efficiently.

Solutions Delivered

Building on this approach, Sourcepass executed a range of initiatives to strengthen MSD's IT foundation. The combination of strategic evaluation and hands-on execution created a secure, modern, and sustainable IT environment that directly supports MSD's core mission.

Infrastructure & Modernization

- Guided the organization through a cloud migration, including shared files, financial systems, and secure hosting.
- Modernized endpoint devices and lifecycle planning to support flexible, hybrid work.
- Prepared for Windows 11 adoption to maintain a secure and current OS environment.

Security & Compliance

- Enhanced network and endpoint security across hybrid work environments.
- Implemented internal access controls and risk mitigation strategies.
- Conducted recurring security assessments to ensure alignment with healthcare data protection standards.

Licensing Optimization

- Consolidated Microsoft and Adobe subscriptions, reducing redundant spend.
- Managed renewals and optimized usage to improve cost-effectiveness.

Operational Support & Service Delivery

- Delivered responsive, localized support through the Quest® platform, providing visibility into tickets, recurring issues, and workflow trends.
- Improved staff satisfaction and operational efficiency by streamlining incident management and proactive maintenance.

Strategic Advisory

- Developed multi-year roadmaps, providing visibility into infrastructure, cloud adoption, security, and lifecycle planning.
- Offered guidance on budgeting, prioritization, and risk mitigation to ensure informed, mission-aligned decisions.



Impact & Results

The partnership has yielded measurable operational, security, and strategic benefits:

Operational Stability & Efficiency

- Improved day-to-day reliability and reduced recurring technical issues.
- Faster issue resolution and better ticket visibility through the Quest® platform.
- Staff can focus on member services and advocacy, confident in stable IT operations.

Strategic Clarity & Prioritization

- Multi-year roadmaps and regular assessments help leadership determine what matters most and allocate resources effectively.
- Leadership reports the guidance has simplified managing multiple responsibilities across finance, HR, facilities, and IT.

Infrastructure Modernization & Cloud Transformation

- Successful cloud migration strengthened flexibility and accessibility.
- Modernized endpoints and network systems support secure hybrid work.
- Windows 11 readiness ensures compliance, stability, and future-proofing.

Security & Compliance

- Enhanced cybersecurity posture across digital and physical assets.
- Risk mitigation for sensitive medical and operational data.
- Reassurance for leadership that collaboration does not compromise protection.

Cost Efficiency

- Optimized licensing reduced unnecessary expenditures.
- Predictable budgeting for infrastructure, cloud, and service renewals.
- Streamlined operations lower overhead and technical debt.

“As a healthcare organization with sensitive medical data, security is everything. Sourcepass helped us make the transition to a hybrid and cloud-based environment without compromising protection or stability. They supported us through tough decisions, reinforced our security posture, and ensured our staff could work confidently from anywhere.”

— Mike Miller

Director, Finance & Human Resources

Looking Forward



MSD and Sourcepass remain aligned on strategic priorities:

- Completing Windows 11 adoption across all endpoints.
- Implementing network segmentation and advanced security measures.
- Continuing cloud adoption and infrastructure modernization.
- Enhancing lifecycle planning and IT budgeting for predictable outcomes.
- Expanding cybersecurity capabilities to mitigate emerging risks.

Sourcepass continues to provide the expertise, guidance, and operational support that enable MSD to pursue its mission of supporting Delaware physicians and advancing community health.

