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Effective Electronic Patient Record Implementations
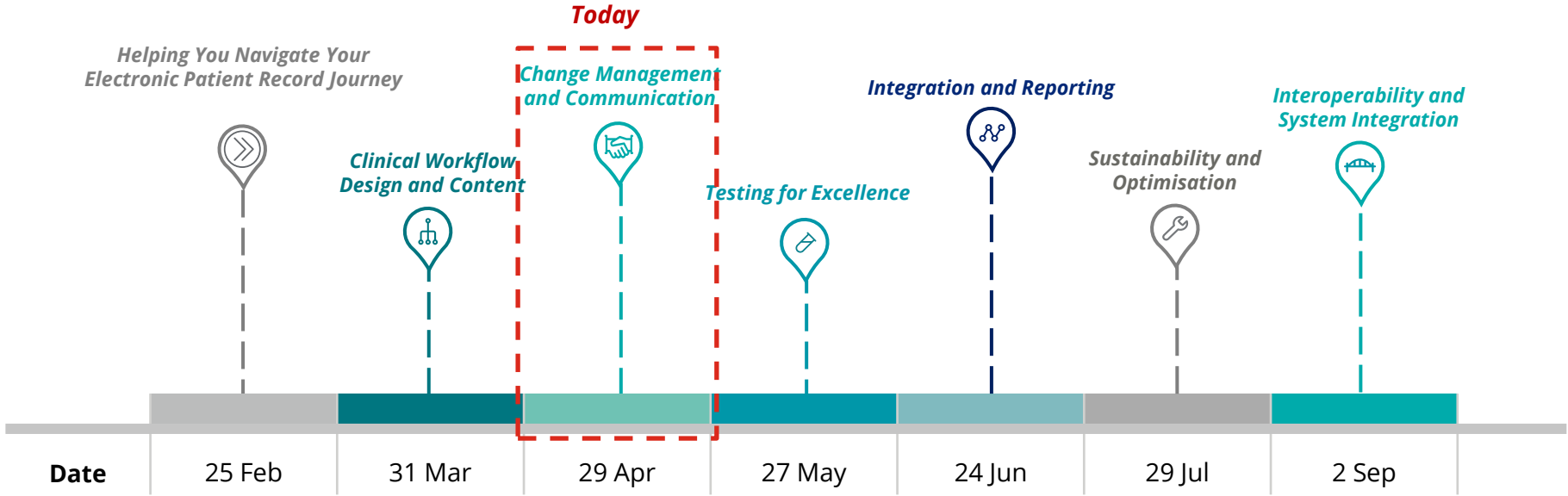Change Management & Communications

April 2021

Effective EPR Implementations: Overview of the Series, Purpose, and Schedule

The Effective EPR Implementations webinar series is a set of seven one-hour virtual sessions with Healthcare providers. This series is focused on EPR implementations and driving your success through a holistic implementation approach

Purpose

- ✓ Focus on effective partnerships necessary to succeed in EPR implementations
- ✓ Highlight common pitfalls faced by clients and areas needing support
- ✓ Share key strategies necessary for healthcare practice transformation through EPR implementations

Schedule

Today

Helping You Navigate Your Electronic Patient Record Journey

Change Management and Communication

Integration and Reporting

Clinical Workflow Design and Content

Interoperability and System Integration

Testing for Excellence

Sustainability and Optimisation

| Date | 25 Feb | 31 Mar | 29 Apr | 27 May | 24 Jun | 29 Jul | 2 Sep |

Speaking With You Today

Fran Cousins

Partner, UK

Marc Perlman

*Global Digital CARE
Leader, US*

Sarah Szpaichler

Senior Manager, US

Cait Reichbach

Senior Manager, US

What is your experience with organisational change?

a)   I have created and led change programmes

b)   I have participated in change programmes

c)   I have not experienced change programmes during organisational transformations
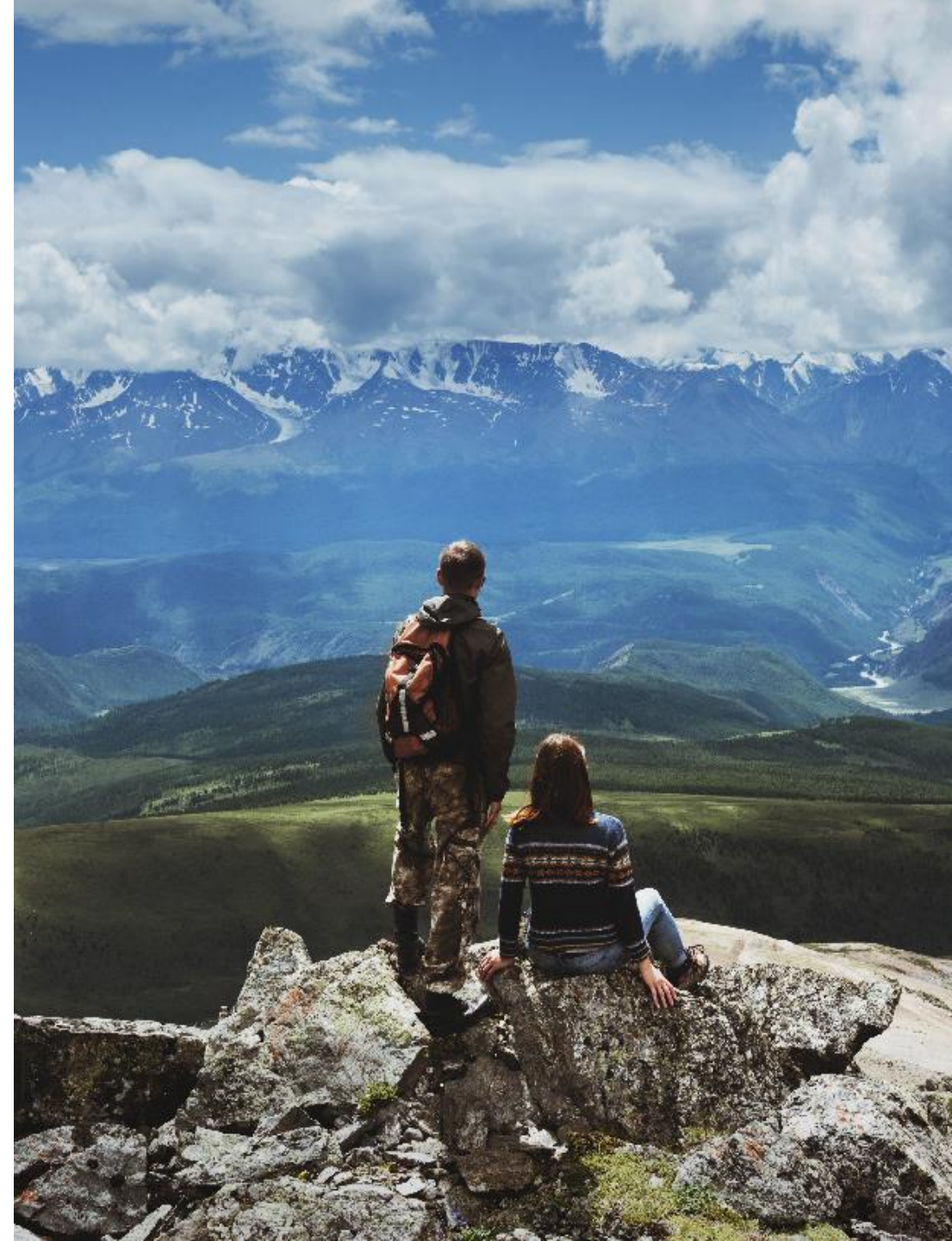
Why Change?

Your EPR Transformation Journey

Too often transformation focuses too much on the destination, but our experience tells us what matters as much is the journey.
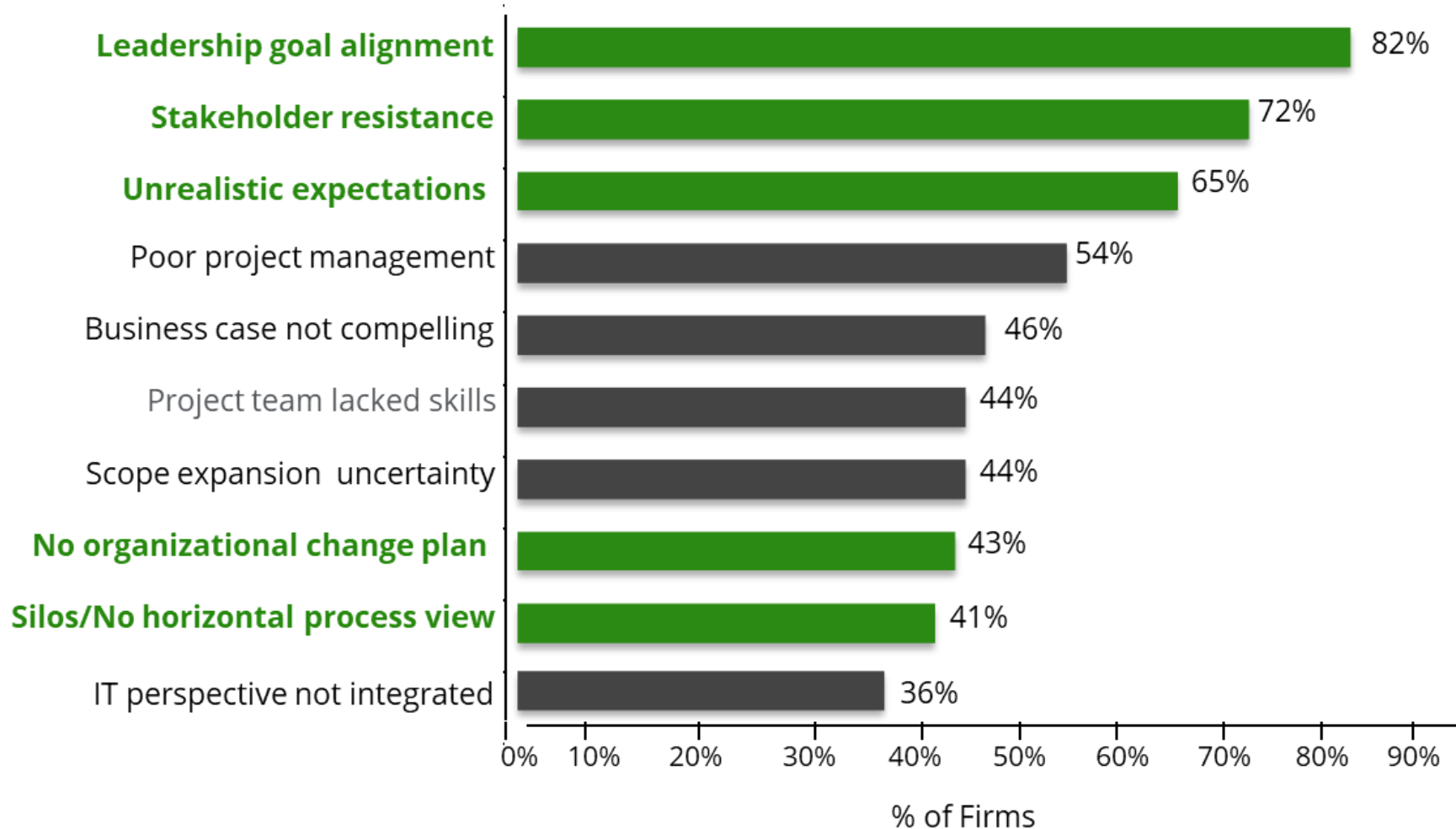
The journey must be designed around the complexities encountered along the way, understanding as we go that change is experienced differently by everyone.

To create a sustainable future, patients and staff need to be put at the heart of the transformation journey.
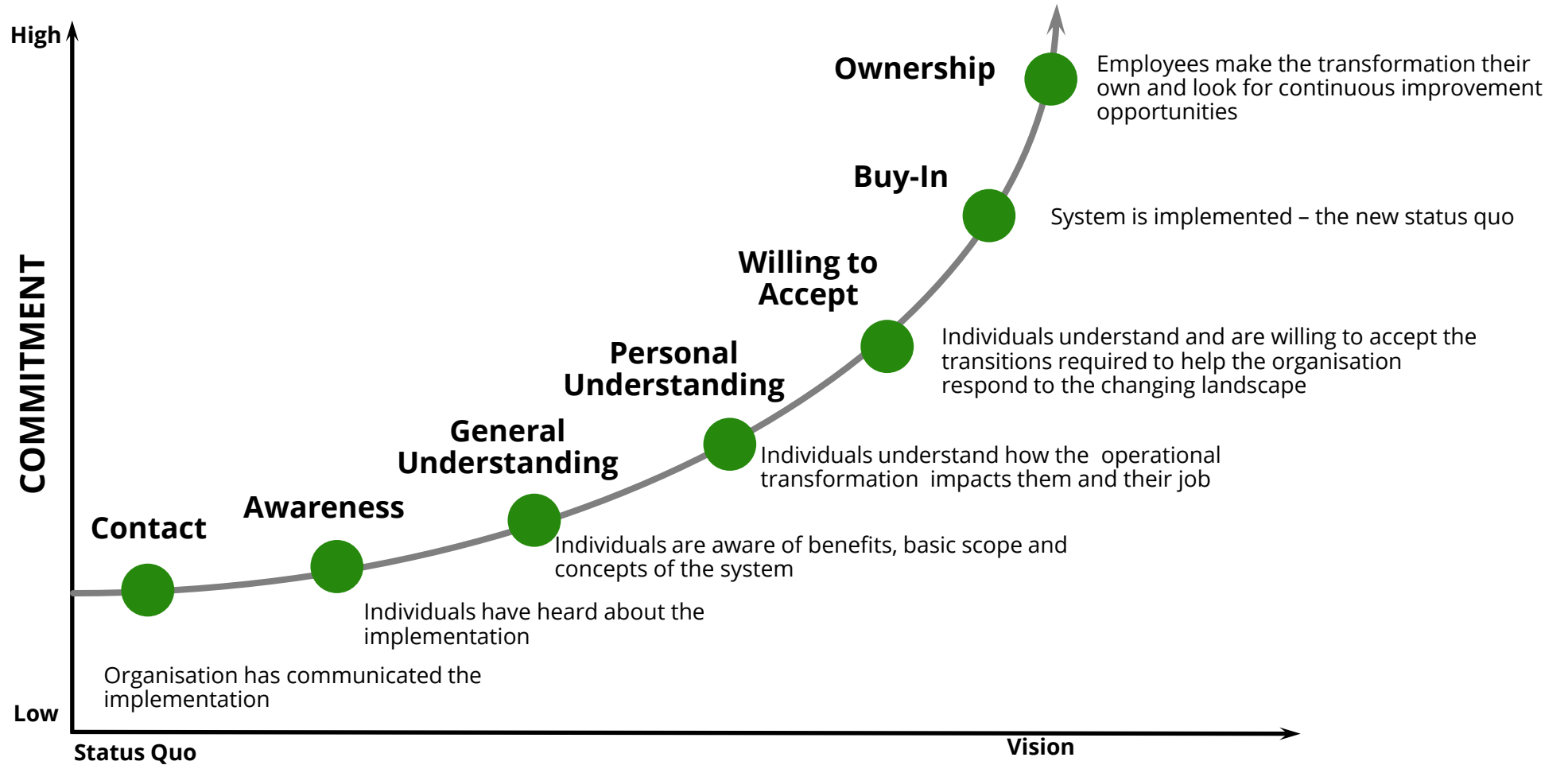
Why Change Management?

Challenge of IT Implementations within a Health Care Setting

Challenge	% of Firms
Leadership goal alignment	82%
Stakeholder resistance	72%
Unrealistic expectations	65%
Poor project management	54%
Business case not compelling	46%
Project team lacked skills	44%
Scope expansion uncertainty	44%
No organizational change plan	43%
Silos/No horizontal process view	41%
IT perspective not integrated	36%

% of Firms

Change Management issues are noted in green
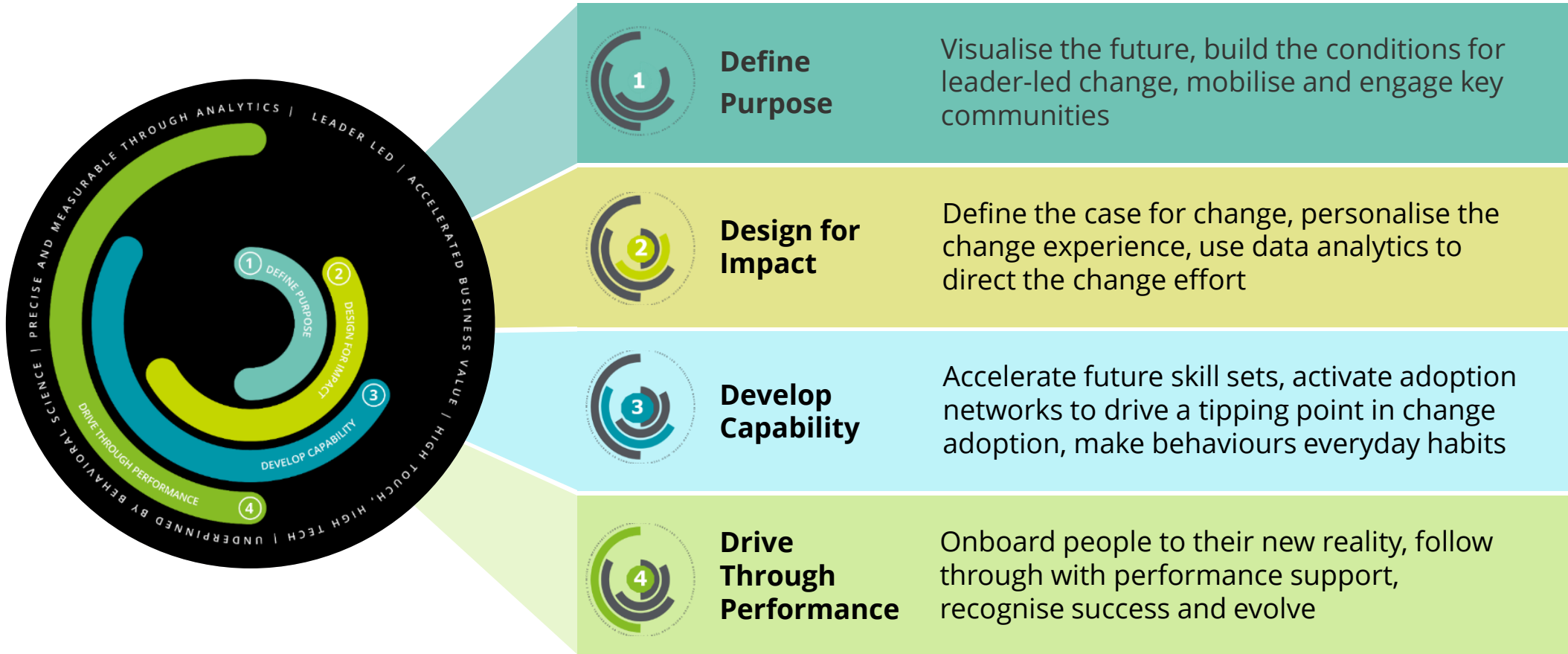*Source: Deloitte CIO Survey*

Commitment Curve

Individuals, rather than organisations, must go through the stages of building commitment to change in order to move the organisation to a new future state.

Ownership
Employees make the transformation their own and look for continuous improvement opportunities

Buy-In
System is implemented – the new status quo

Willing to Accept
Individuals understand and are willing to accept the transitions required to help the organisation respond to the changing landscape

Personal Understanding
Individuals understand how the operational transformation impacts them and their job

General Understanding
Individuals are aware of benefits, basic scope and concepts of the system

Awareness
Individuals have heard about the implementation

Contact
Organisation has communicated the implementation

COMMITMENT — High / Low

Status Quo — Vision

Today's Agenda

Using Deloitte's Vision to Value Change Management Framework, we will explore how to operationalise change to achieve your EPR transformation results

Define Purpose
Visualise the future, build the conditions for leader-led change, mobilise and engage key communities

Design for Impact
Define the case for change, personalise the change experience, use data analytics to direct the change effort

Develop Capability
Accelerate future skill sets, activate adoption networks to drive a tipping point in change adoption, make behaviours everyday habits

Drive Through Performance
Onboard people to their new reality, follow through with performance support, recognise success and evolve

Define Purpose

Define Purpose

Visualise the future, build the conditions for leader-led change, mobilise and engage key communities

Expected Value

- The need for change is clear

- The benefits of change are well articulated, clearly aligned to strategic goals and communicated with impact

- Leaders are aligned and well equipped to the transformation

- Key communities have been identified and engaged

Bring the "Right" People to the Table

Like workflow design, change management is a team sport

Project Team

Vendor
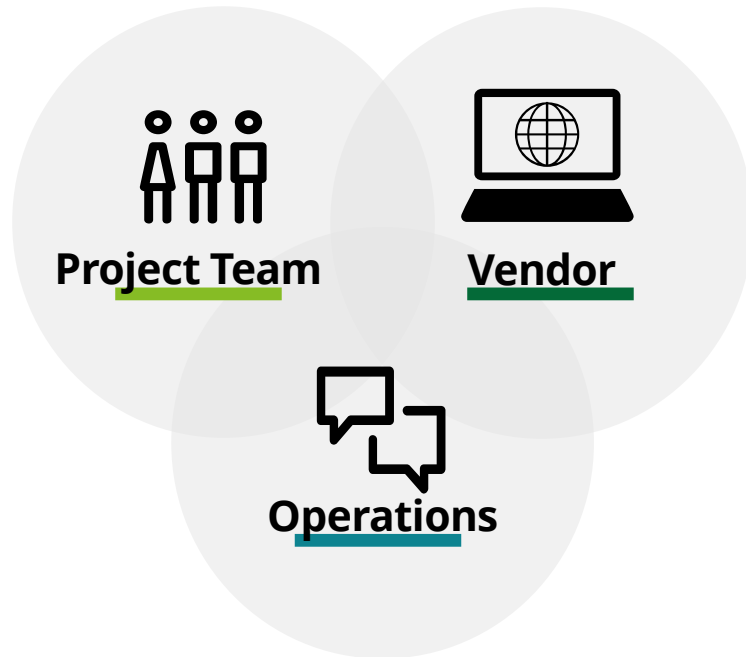
Operations

Project Team

Change management specialists, analysts, trainers and other project team members bring a wide range of expertise to the table to create effective change content.

Operations

Clinical and administrative leaders and managers are critical to leader-led, operationally-owned change enabled by the Project Team.

Vendor

The vendor brings technology-focused tools and activities that can be leveraged as change events through coordination and planning.

When everyone with a "stake in the game" participates, change management activities will minimise disruption at go live and foster long-term sustainability.

Revisit: Programme Governance

Setting a strong foundation from the beginning enhances overall outcomes and Programme success

Governance

A well-structured governance model helps ensure decisions are made at the right level, by the right stakeholders, at the right time

Guiding Principles

Establishing appropriate Guiding Principles sets the ground rules for system design and implementation, guides decisions, and keeps teams focused on overall goals, objectives, and the desired end state
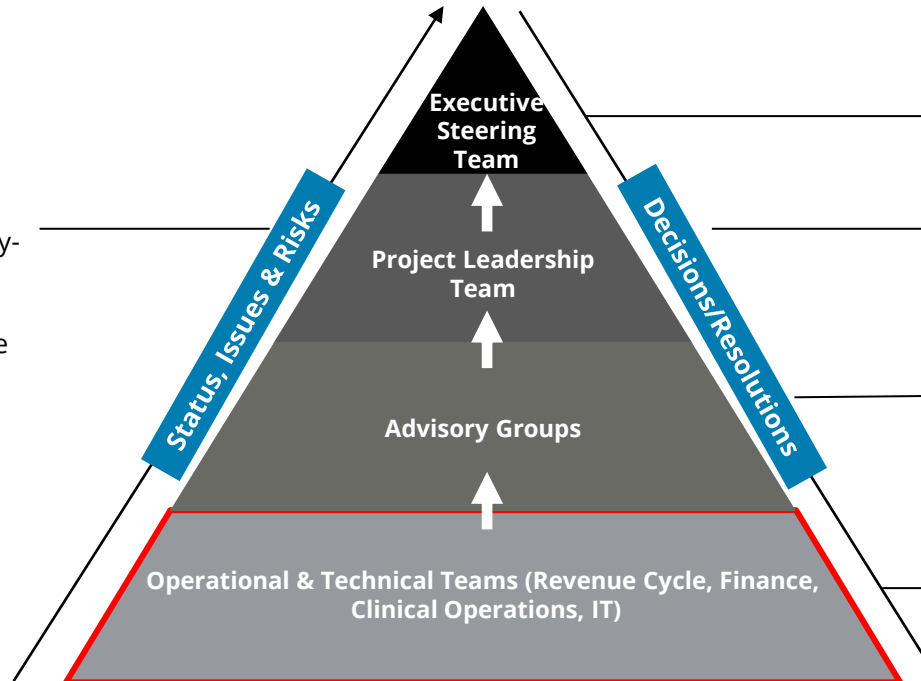
Effective Decision Making

Decisions that could potentially impact the programme timeline, cost, quality, safety and/or future-state operating model should be escalated to programme and clinical governance

Establish Leadership Support

Leadership support and buy-in is cultivated from the very beginning of the Programme

Status, Issues & Risks

Decisions/Resolutions

- Executive Steering Team
- Project Leadership Team
- Advisory Groups
- Operational & Technical Teams (Revenue Cycle, Finance, Clinical Operations, IT)

Project vision and guiding principles are defined

Workflow scoping decisions are often made here

Integrated workflow decisions points are reviewed and approved in Advisory Groups

Key metrics are identified

Most workflow decisions happen within the technical teams and clinical and business operations

Importance of Governance, Guiding Principles and Effective Decision Making

1 Commitment from key stakeholders

2 Align direction

3 Better decisions

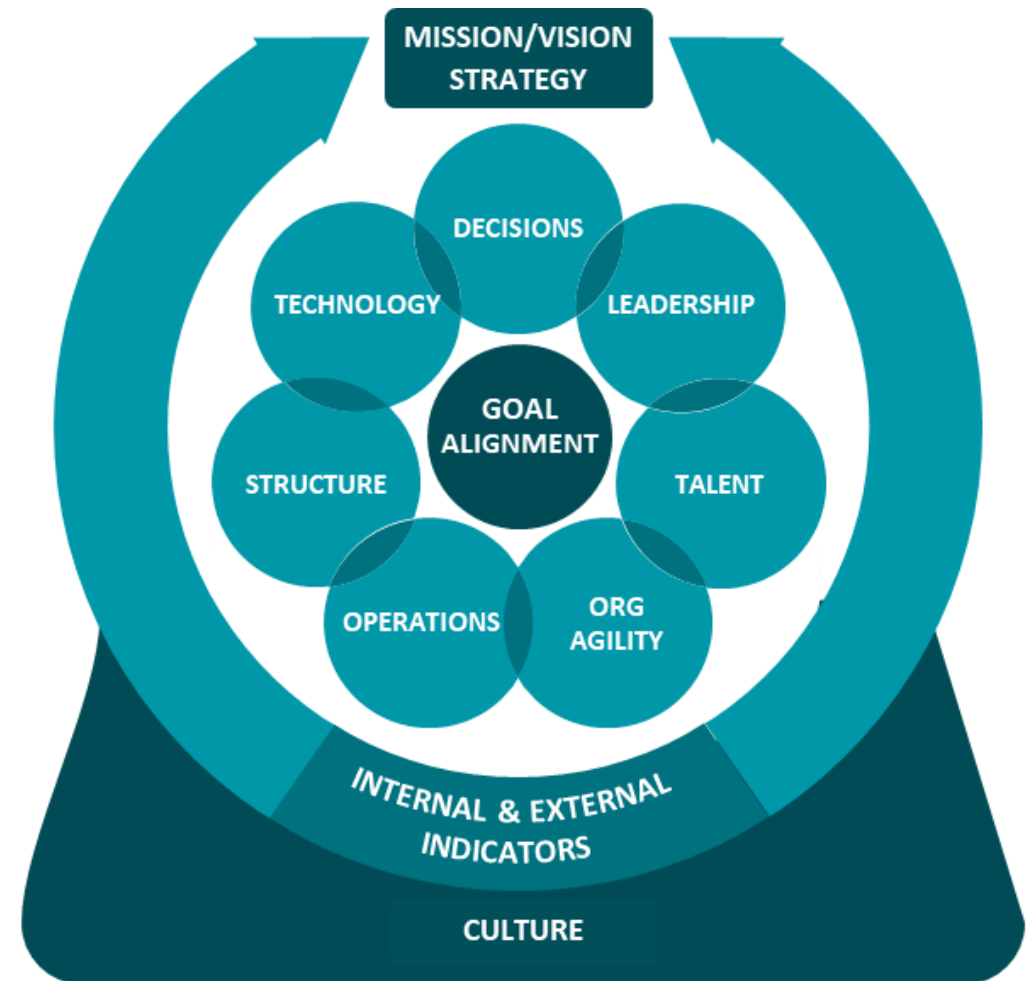# Build the conditions for leader-led change

DIAGNOSE

Evaluate alignment with implementation strategy and goals

ENGAGE

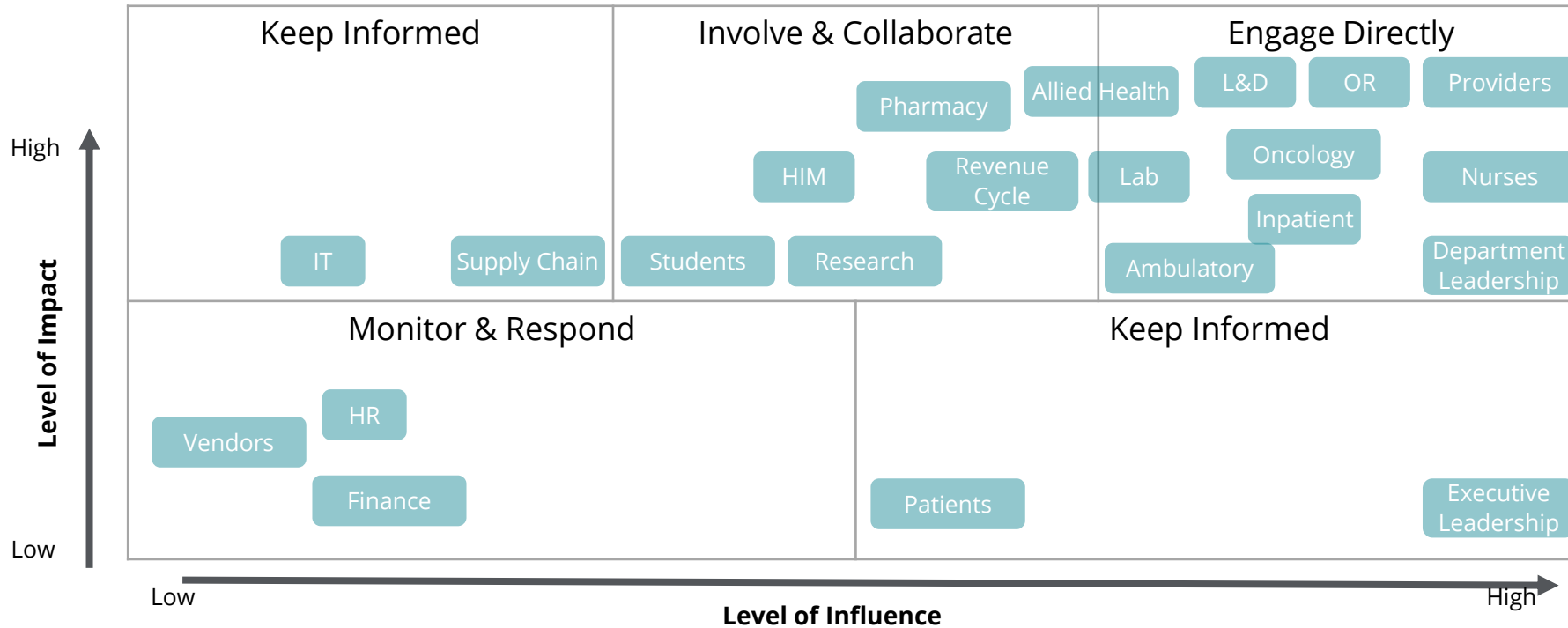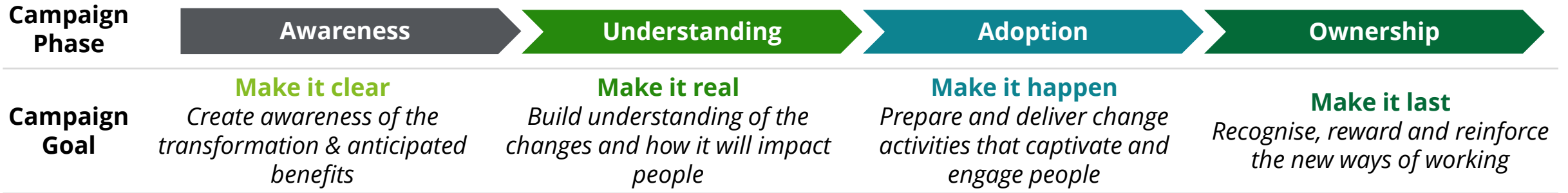Develop organisational insights and interventions

ALIGN

Initiate targeted interventions to drive sustainable change

Deloitte's *Shared Vision & Goal Alignment* Framework

Identify, mobilise and engage communities

Campaign Phase	Awareness	Understanding	Adoption	Ownership

Campaign Goal	**Make it clear** *Create awareness of the transformation & anticipated benefits*	**Make it real** *Build understanding of the changes and how it will impact people*	**Make it happen** *Prepare and deliver change activities that captivate and engage people*	**Make it last** *Recognise, reward and reinforce the new ways of working*

Keep Informed

Involve & Collaborate

Engage Directly

High

Pharmacy | Allied Health | L&D | OR | Providers

HIM | Revenue Cycle | Lab | Oncology | Nurses

Inpatient

IT | Supply Chain | Students | Research | Ambulatory | Department Leadership

Level of Impact

Monitor & Respond

Keep Informed

HR

Vendors

Finance

Patients

Executive Leadership

Low

Low — **Level of Influence** — High

Design for impact

Design for Impact

Define the case for change, personalise the change experience, use data analytics to direct the change effort

Expected Value

- Organisation designed to support change and **enable business strategy**

- Identification and **mitigation of risks** and measurement of **change readiness**

- Comprehensive **change roadmap** based on data insights to achieve business outcomes

Change Agent Networks

A Change Agent Network group of individuals representing their peers from across the organisation

Organisational Readiness Sponsor

Change Leads

Change Agents
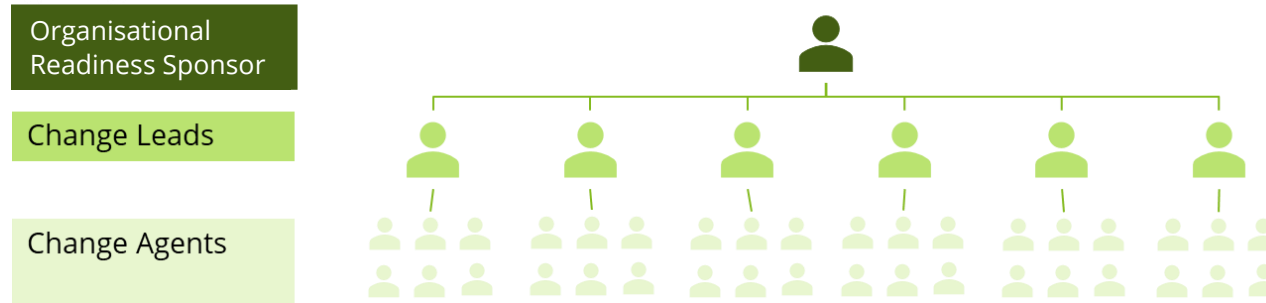
Improve communication and collaboration through bi-directional feedback loops

Establish credibility in communications through peers and local leaders

Collect and disseminate data and feedback efficiently to accelerate intervention

Minimise uncertainty and ambiguity and increase buy-in through awareness

Use data analytics to direct the change

Assessments provide a better understanding of the magnitude of change, its impact, how ready the business is to receive it and any interventions required to support business acceptance
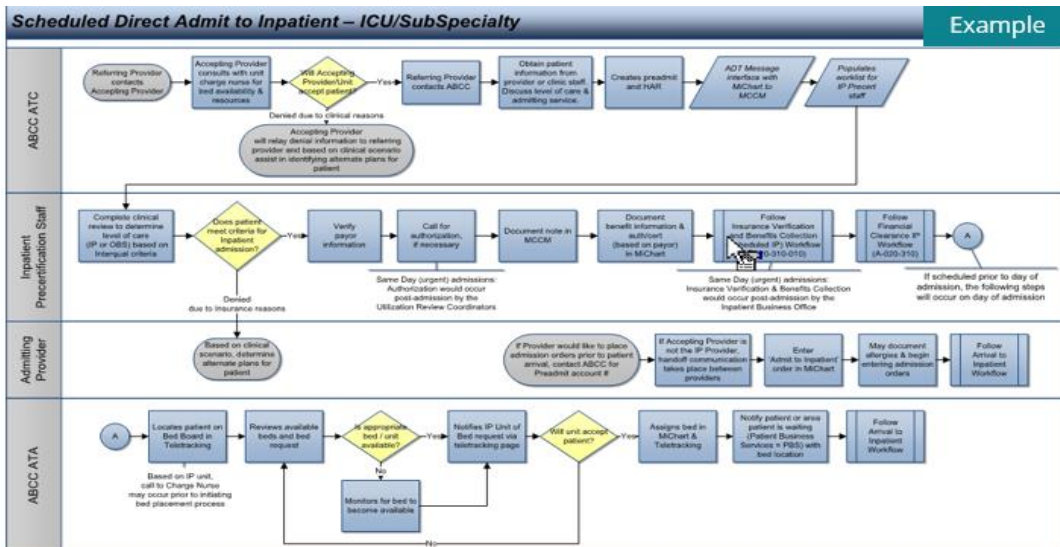
Change Impacts Assessment

- Engage physicians, clinicians, and other staff to **gain visibility in future state through workflow review**

- Systematically determine **people, process, technology,** and role impacts in advance of go-live to minimise the disruption

Change Readiness Assessment

- Identify how stakeholders are **progressing against the commitment curve** in order to develop targeted interventions that best meet user needs

- Identify change risks and **areas of resistance** and put in place activities to mitigate
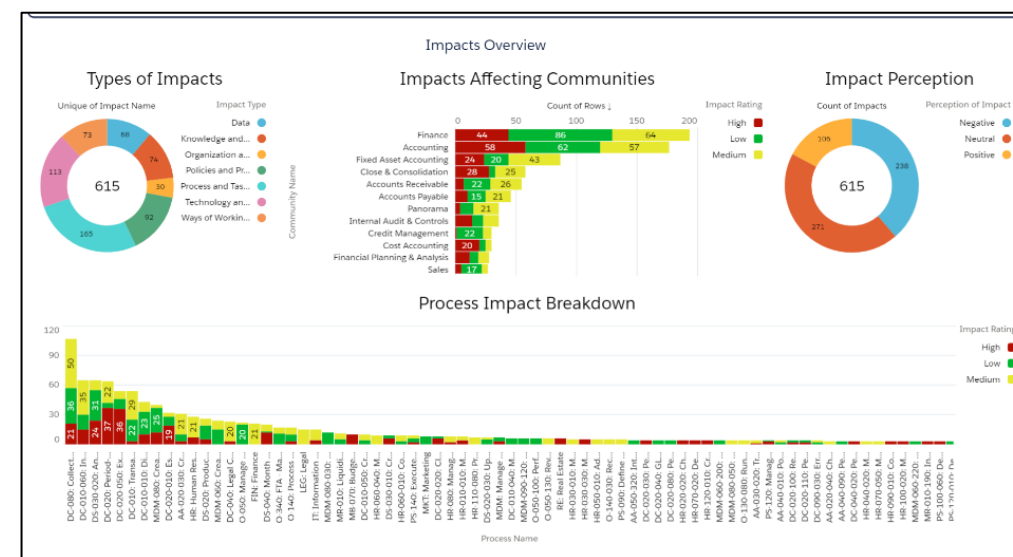
Analytics drive personalisation of the change journey

Change Impact Reports created for each community will create awareness of the volume and type of impacts, and indicate how readiness and capability development will prepare staff for training and implementation

Impact Type

People	Processes	Technology
• New **skill** required to perform job • Change in **ways of working** • Change in **job accountability** or ownership • Change in **reporting relationships** • Change in **location**, department, or organisation	• Change in the **way the work gets done** • Change in **data sources** or inputs • Change in reports or **outputs** • Change in the **frequency** of the work • Change in **communication** or interaction	• Change in the **systems** required to complete job tasks • Change in the **interface or integration** points for existing technology • Change from a manual task to **automated** or technology supported task

Rating Scale

Low	Medium	High
Though these changes require new behaviour and may be uncomfortable in the beginning, they are relatively low-impact changes	Many of the ways in which employees do their job will change. They may have new work, requiring new skills	A fundamental change in the way teammates do their job. They will require training to perform their job in the future

Going digital with change

ChangeScout combines cutting-edge technology, access to experts, and Deloitte's unique change methodology to transform the way change is delivered – ultimately delivering a better change experience for your people
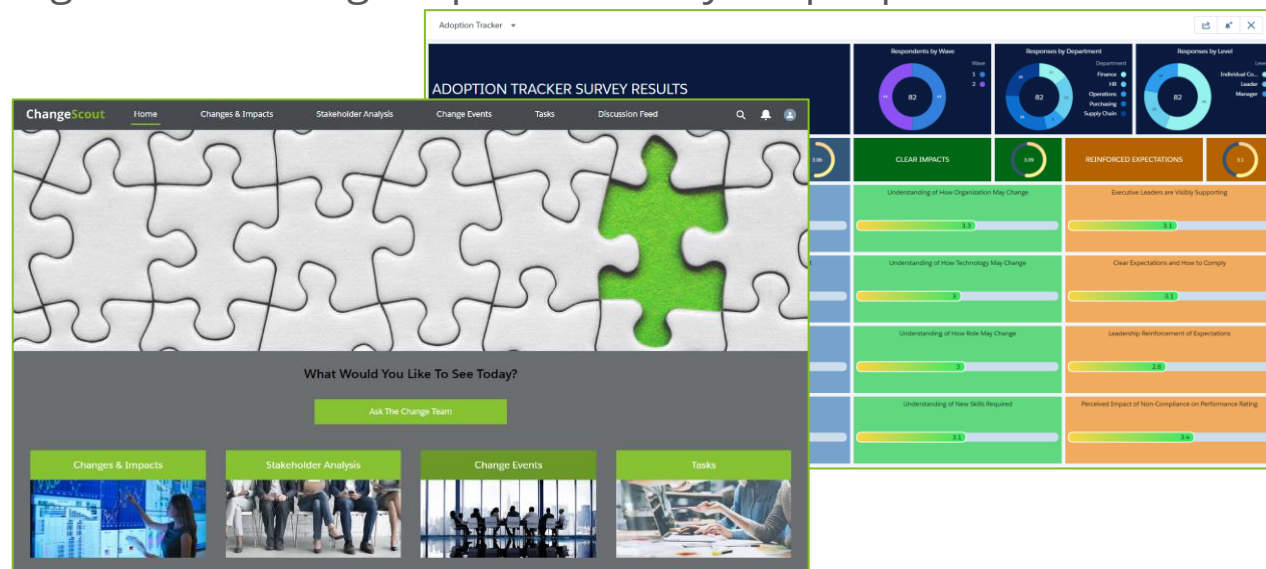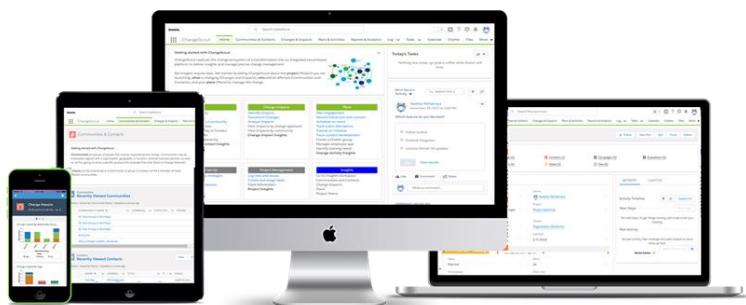
AI and Insights Driven	Pre-Configured Solutions	Change Capability Enablement	Cross-Project Visibility	Automated Deliverables

Develop Capability

Develop Capability

Accelerate future skill sets, activate adoption networks to drive a tipping point in adoption, make behaviours everyday habits

Expected Value

- Adoption networks are equipped and supported to **drive the change agenda**.

- People are introduced to **new roles, benefits, skills and behaviours**.

- **Self-paced, personalised learning experiences** allow individuals to drive the experience of learning in ways that work best for them as individuals.

- Moments of **employee engagement** are targeted to build greater commitment.

- Organisation has the capability to **operate in the future**.

Accelerate future skill sets through readiness and learning

Factors

Degree of Change

| Low | — | High |

Perception of Change

| Positive | — | Negative |

Objective

| Introduce | — | Reinforce |

Setting

| Individual | — | Group |

Format

| Virtual | — | Live |
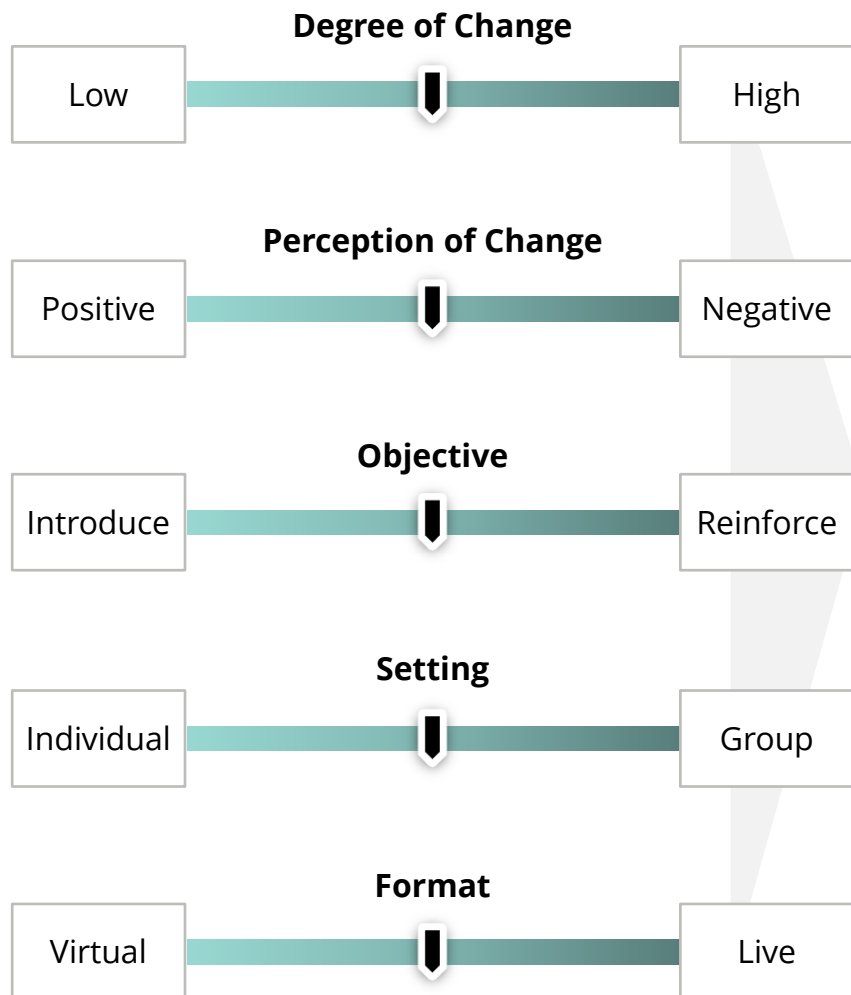
Readiness & Learning Tactics

Communications & Presentations

- Employee & Physician Communications
- Playbooks
- Leadership & Staff Meeting Presentations
- Live Demos & Sneak Peaks

Videos & eLearning

- System Overviews
- eTips
- Learning Hub
- "101" Courses

Virtual/Instructor Led Training

- Role-specific trainings
- Custom workflows and content
- Learning Fair

Hands On Practice

- Training practice environment
- Facilitated practice labs, relevant practice scenarios
- Personalisation Labs

Onsite Support

- Super Users/ At-the-elbow support
- Training Café' Kiosks
- LiveChat

Sample End User Journey
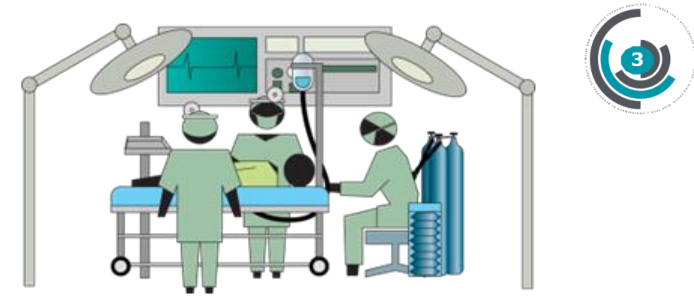
SURGICAL PROVIDER
Readiness & Learning Plan

T-4+ Months	T- 3 Months	T-2 Months	T- 1 Month	Go-Live
• Attend department presentations and demos • Connect with the Physician Champions in your department • Review "Need to Knows": *Orders; Medication Reconciliation; Consults*	• Complete eLearnings: *EPR 101* • Attend the EPR Expo • Attend a Workflow Walkthrough: *Clinic Visit to Case Scheduling*	• Attend Training • Participate in a Group Practice Activity: *Transitions of Care – OR to Inpatient* • Attend a log-in lab	• Attend Personalisation • Participate in Shadow Charting • Review Quick Reference Guides	• Review weekly Go-Live checklists • Connect w/ your Super Users • Drop-in a Learning Café for additional support

Activate and prepare Super Users

- Support activities leading up to go-live (e.g., testing, training)
- Provide assistance with business processes and EPR functionality during go-live period
- Improve utilisation of system
- Increase bandwidth of post Go Live support team
- Contribute to "tips & tricks" and "FAQs" to help end-users to efficiently use the EPR

Drive Through Performance

Drive Through Performance

Onboard people to their new reality, follow through with performance support, recognise success and evolve

Expected Value

- Individuals are working in the **new system**.

- People feel **empowered and able to adapt**.

- Analysis shows that the **change is sustainable & embedded**.

- **Practices are embedded** in the org, teams and individuals to in support of the business future.

Make behaviours everyday habits

Long-term sustainability of your EPR system requires ongoing activities post-live to enable upgrades, optimisation, and onboarding new staff to your organisation

Metrics

Super Users

Education
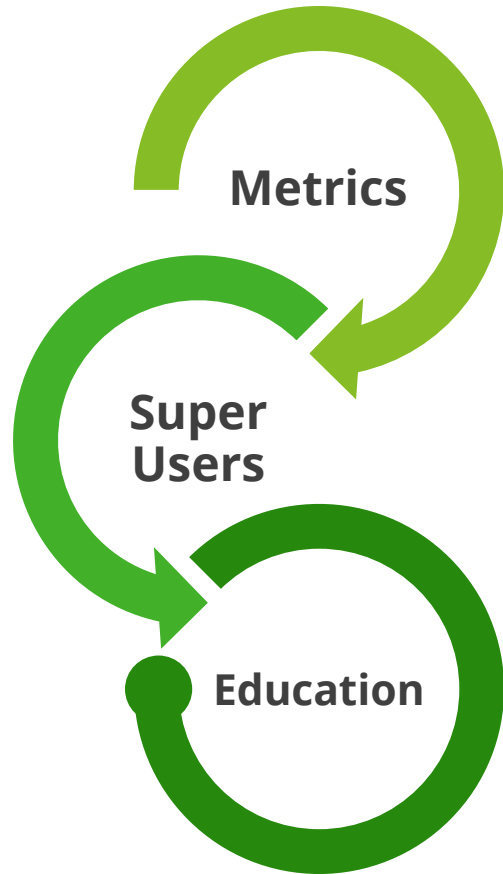
Measure for success

- Key performance indicators for clinical processes
- Efficient use of the system without workarounds
- Productivity time of physicians and other clinicians

Support for sustainability

- Continuous Super User support when upgrades and optimisations occur
- Bi-directional feedback between clinical operations and IT
- Onboarding and education assistance for new hires

Educate for capability

- Differentiate implementation training from new hire onboarding
- Determine how training materials will be maintained, and who will own them
- Consider self-directed or virtual learning for repeatable processes

Recognise success and evolve

Incorporating these best practices in your implementation and post-live models will enable the long-term sustainment of staff in use of your EPR system.

✓ **Invest in a dedicated team to focus on delivering change programmes**

✓ **Engage physicians, clinicians, and other staff early on and throughout the project**

✓ **Recognise that not all change journeys are equal, and personalise**

✓ **Establish baselines and measure readiness through qualitative and quantitative metrics**

✓ **Foster cross-team collaboration to maximise value of programme activities**

✓ **Consider change a long-term, iterative process versus a moment in time**

Q&A

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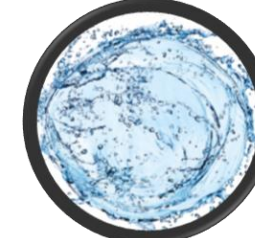
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Testing for Excellence

Thursday 27 May 2021

4:00 – 5:00 pm BST

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