



Workflow Planning/Implementation and Change Management



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Agenda

- Human Behavior
- Organizational Behavior
- Outcomes Driven Culture
- Q&A



Objectives

To understand the human and organization factors that will drive us toward improved outcomes, processes and customer (provider/patient/staff) satisfaction.



If you build it, they will come...Right?

As it turns out, the technology is the easy part!

This is not a new problem and we've all got stories:

- Copiers
- Fax Machines
- Personal Computers
- Smart phones
- EMRs
- Interoperability



So, how do we get there?



Change Leadership

Effecting Change

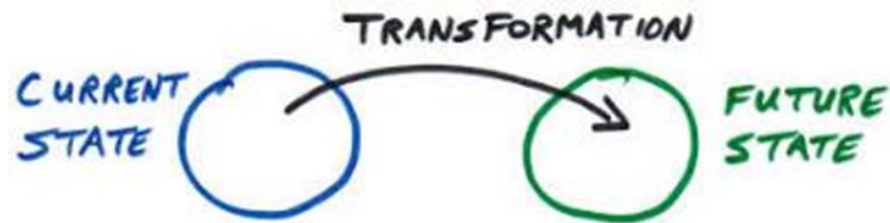
- Project Governance – Champions
- Communicating Vision
- Encouraging
- Inspiring buy-in from all team members
- Establish direction



Change Management

Implementing change

- Planning
- Staffing
- Budgeting
- Identifying variance
- Maintaining order
- On-time and On budget



Human Behavior

Sharing the Vision

Personal Change is easy –
You've already got buy-in

A small company, office,
hospital can be pretty nimble.
A community of like minded
thinkers.

Our challenge now is to
extend that vision, that goal,
beyond our walls. A shared
vision, a belief in and trust of
the process





Human Behavior

Sharing the Vision

The solution is so obvious – Let me just implement it and tell the team what to do.

- Skipping to step 5 is a common pitfall to successful change management.
- Identify the problem and build a partnership to achieve a *shared* vision

Human Behavior

Sharing the Vision

Identifying Complacency

- That's the way we've always done it
- The group we expect to change must agree there is a problem and that the impact on the patient/outcomes/revenue is worth making a change for.
- When the crisis isn't visible, it's difficult to incite action



Human Behavior

Sharing the Vision

Eliminate Complacency

- Eliminate a false sense that things are great as they are.
- Share stories of where the current model breaks down; fails patients and providers
- Get external feedback from providers, patients and other customers



Human Behavior

Sharing the Vision

Urgency (Step 1)

- We are all in this together, with a common goal of helping patients
- When staff know they are impeding that goal by not using technology, they will join forces and become part of the coalition **(Step 2)**.



Human Behavior

Understanding Why It Matters

Transitions of Care and Care Coordination

- Agree on what you're working toward (**Step 3**)
- i.e. Improve a patient's experience after an inpatient stay, by making the visit summary available, on line for the BH Clinic staff, before the patient's follow up visit

Human Behavior

Understanding Why It Matters

Transitions of Care and Care Coordination

- Let's take that a step further, remove some of the needless debate
- i.e. We received a grant to improve this process because we have data to support that we are not meeting the needs of our customers. We are being challenged to use technology, to automate our process, in order to better meet their needs.

Human Behavior

Defining the process

Now that we all agree....



- On *what* we're working toward
- And that it's *worth* working toward
- Let's work together to map it out
(Step 4)

Human Behavior

Defining the process

Educate the team – technology, current workflow, resources

Always keep the goal at the forefront – What are we trying to accomplish and why

Understand known limitations –

Resources, money, space, technology

Map out a plan that the key players can support and articulate



Organizational Behavior

Communicating the Goal

Transitions of Care and Care Coordination

- Let's take that a step further, remove some of the needless debate
- i.e. We **received a grant** to improve this process because we have data to support that **we are not meeting the needs of our customers**. We are being challenged to **use technology**, to **automate our process**, in order to better meet their needs, **by the end of 2017**.

Organizational Behavior

Communicating the Goal

- Simple
- Visual
- Repeatedly – Verbal, email, newsletter
- Champions – Walk the talk, support the vision
- Solicit, Accept and *Listen* to feedback



Organizational Behavior

Identifying Roadblocks (**Step 5**)

Communication – There is never too much

- What's coming?
- Why is it coming?
- When is it coming?
- How will it affect me?
- Who participated in this decision?



Organizational Behavior

Identifying Roadblocks (**Step 5**)

Education - Plan adequate training

- Internal staff
- External customers – i.e. staff at provider offices who will receive transition of care.
- Consumers – Patients i.e. We will send this report to Dr. Jones so that she has it before your next appointment



Organizational Behavior

Identifying Roadblocks (**Step 5**)

Resources – Is current staffing adequate?

- Run through process
- Ensure number and expertise will meet the needs of the new process

Documentation – Policies, Procedures

- Easily accessible
- Visual

Technology

Organizational Behavior

Establishing a clear path

Milestones to Celebrate (Step 6)

- Transformation takes time
- Short term, attainable, measureable goals
 - Keep team members engaged
 - Ensure project is on track
- Communication and Commitment from stakeholders
- Evaluate often, identify and mitigate risk
- Celebrate success

Organizational Behavior

Establishing a clear path

Milestones to Celebrate (Step 6)

Example:

- Documentation will be complete by week two
- Computers upgraded by week three
- Education scripts complete by week three
- Users will be trained during weeks 4 and 5
 - Temp help to cover training and two hours practice for four days following, for each student

At the end of week 5 – evaluate, mitigate, celebrate



Outcomes Driven Culture

Patient Expectations

- Communication must include **all stakeholders**
- **Patient's required to give more detail** up front in an automated world
- **Assure them** that this information will be waiting at the next visit and with the next provider of care
- When the players know the patient is in on the secret, expecting and celebrating that outcome, **staff will follow through**



Outcomes Driven Culture

Clinician Handoff – For example

- Registration – Populate from previous and modify as needed
- Documentation – Pull forward history, i.e. medication reconciliation, modify as needed
- Discharge/Depart patient – Document follow-up to provider XYZ and DC Instructions
- Encounter summary – Arrives in next provider-of-care's EHR
- Repeat

Outcomes Driven Culture Decision Support **(Step 7)**

- As the transformation blossoms, it is typical to lose urgency, passion for results
- The process should always be challenged for what's missing
- Decision support is the holy grail
 - You're getting the encounter summary, but is that enough?
 - Is there more we can provide in the TOC that will allow you to better care for your patients?

Outcomes Driven Culture Benchmarks



How will you measure success?

Measureable data points are key

Measure established data points before
initiating change. i.e.

- 100% of encounter summaries are faxed today
- 63% of providers receive electronic lab results when we refer patients
- 7 calls daily on average from the Main Street clinic to request a faxed record

Outcomes Driven Culture

Accountability



When the “final” milestone is met, Celebrate!

Key players must stay engaged throughout the process and after

Maintain clarity

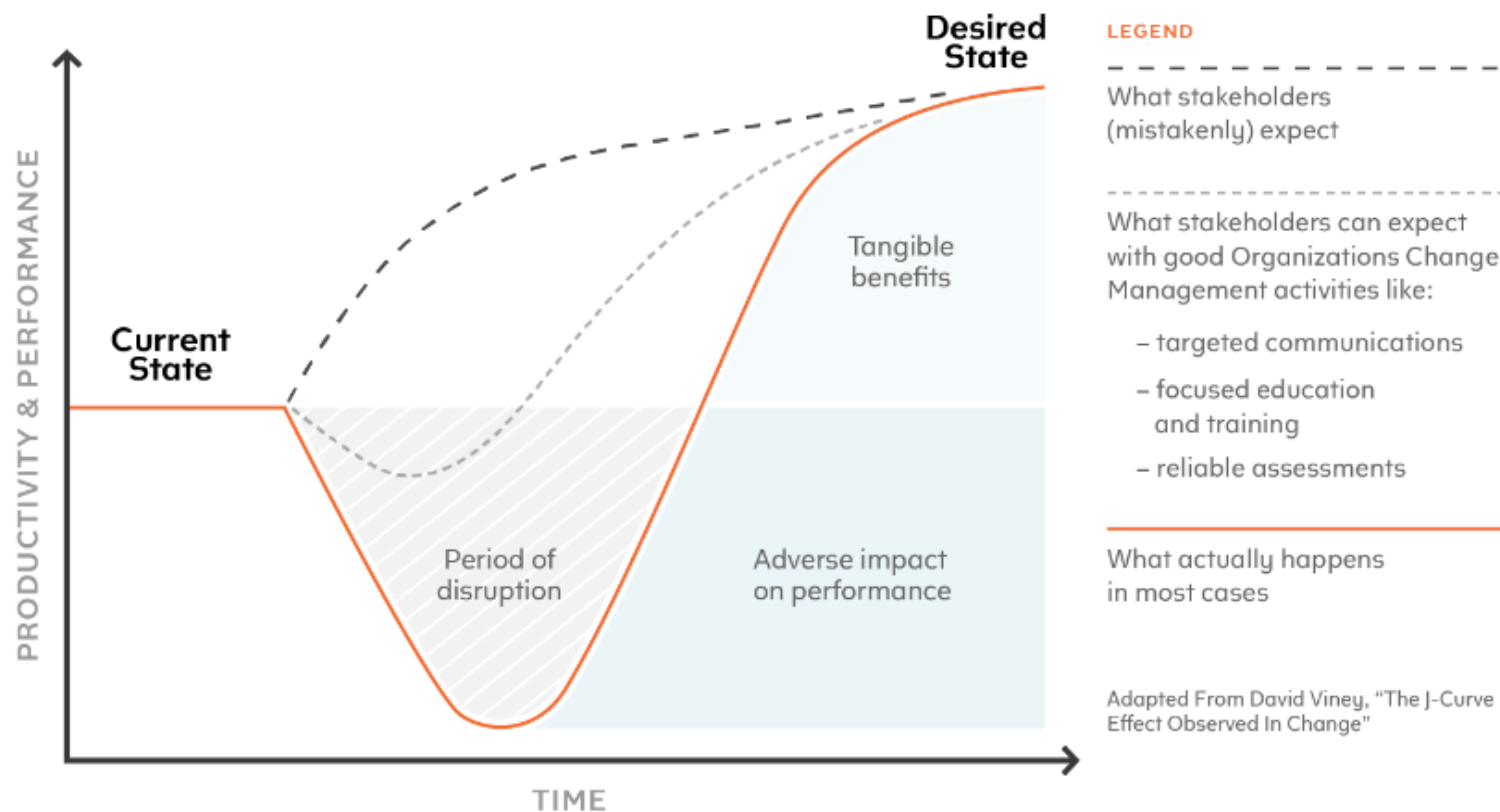
Reinforce the vision

This change must become part of ongoing training and new employee training

Outcomes Driven Culture

Preparing for the J-Curve of Change

The J-Curve



Outcomes Driven Culture

Accountability

Culture change is usually last so don't let your guard down.

- Attitudes and behavior will shift throughout the process with each small win
- Continued observations and measurements will ensure that regression to old habits is caught early and is an opportunity to celebrate continued success.



Sustaining change

The saying goes.....

“If you build it, they will come”

But....

You must show value so they'll *want* to stay

improve workflow, revenue and patient outcomes

And.....

they will dig their heels in and refuse to go back!

A Recipe for Success



Q&A

