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
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.
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 confidence for success.
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!

Every player 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

LEGEND

What stakeholders (mistakenly) expect

What stakeholders can expect with good Organizations Change Management activities like:

- targeted communications
- focused education and training
- reliable assessments

What actually happens in most cases

Adapted From David Yiney, “The J-Curve Effect Observed In Change”
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 heals in and refuse to go back!
A Recipe for Success

1. CREATE Sense of Urgency
2. BUILD Guiding Coalition
3. FORM Strategic Vision & Initiatives
4. ENLIST Volunteer Army
5. ENABLE Action by Removing Barriers
6. GENERATE Short-term Wins
7. SUSTAIN Acceleration
8. INSTITUTE Change

The Big Opportunity