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

<table>
<thead>
<tr>
<th>Date</th>
<th>Subject</th>
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<tbody>
<tr>
<td>25 Feb</td>
<td>Today</td>
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<tr>
<td>31 Mar</td>
<td>Help</td>
</tr>
<tr>
<td>29 Apr</td>
<td>Change</td>
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<td>27 May</td>
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<td>24 Jun</td>
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<td>29 Jul</td>
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<td>2 Sep</td>
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- **Helping You Navigate Your Electronic Patient Record Journey**
- **Clinical Workflow Design and Content**
- **Testing for Excellence**
- **Integration and Reporting**
- **Sustainability and Optimisation**
- **Interoperability and System Integration**
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

- 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%
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.
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

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

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

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

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

Define Purpose

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**
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

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

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**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

<table>
<thead>
<tr>
<th>Campaign Phase</th>
<th>Awareness</th>
<th>Understanding</th>
<th>Adoption</th>
<th>Ownership</th>
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<tbody>
<tr>
<td><strong>Campaign Goal</strong></td>
<td>Make it clear <em>Create awareness of the transformation &amp; anticipated benefits</em></td>
<td>Make it real <em>Build understanding of the changes and how it will impact people</em></td>
<td>Make it happen <em>Prepare and deliver change activities that captivate and engage people</em></td>
<td>Make it last <em>Recognise, reward and reinforce the new ways of working</em></td>
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### Keep Informed
- IT
- Supply Chain
- HR
- Finance
- Providers
- L&D
- OR
- Nurses
- Department Leadership

### Involve & Collaborate
- Pharmacy
- HIM
- Revenue Cycle
- Lab
- Oncology
- Inpatient
- Ambulatory
- Students
- Research
- Department Leadership

### Engage Directly
- HIM
- Revenue Cycle
- Lab
- Oncology
- Inpatient
- Ambulatory
- Nurses
- Department Leadership

### Monitor & Respond
- Vendors
- IT
- Patients
- Executive Leadership

### Level of Impact
- High
- Low

### Level of Influence
- Low
- High
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

- 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
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**
  - 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

- **Processes**
  - 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

- **Technology**
  - 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**
  - Though these changes require new behaviour and may be uncomfortable in the beginning, they are relatively low-impact changes

- **Medium**
  - Many of the ways in which employees do their job will change. They may have new work, requiring new skills

- **High**
  - 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.

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### AI and Insights Driven

- [Icon: Graph]

### Pre-Configured Solutions

- [Icon: Tool]

### Change Capability Enablement

- [Icon: Person]

### Cross-Project Visibility

- [Icon: Eye]

### Automated Deliverables

- [Icon: Network]
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.
### Factors

<table>
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<tr>
<th>Degree of Change</th>
<th>Perception of Change</th>
<th>Objective</th>
<th>Setting</th>
<th>Format</th>
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<tbody>
<tr>
<td>Low</td>
<td>Positive</td>
<td>Introduce</td>
<td>Individual</td>
<td>Virtual</td>
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<tr>
<td>High</td>
<td>Negative</td>
<td>Reinforce</td>
<td>Group</td>
<td>Live</td>
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### 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**

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

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

**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
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Testing for Excellence

Thursday 27 May 2021
4:00 – 5:00 pm BST
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