

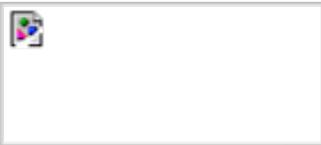


10 Important Criteria for Change Management Success

Karen Korb
TELUS Health Solutions
November 23, 2009

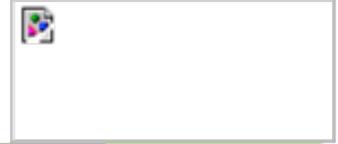
Objectives

- Define Change Management in the e-health project
- Present 10 key Change Management concepts
- Identify common outcomes of ineffective change management



What is Change Management?

What is Change Management?



- **Change management / Change control**

- the process during which the changes of a system are implemented in a controlled manner by following a pre-defined framework/model with, to some extent, reasonable modifications Wardale, Dorothy. Resource Kit: Rural Health Service Development (2003)

- **Change management**

- a structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state.

- **Project management**

- the discipline of planning, organizing, and managing resources to bring about the successful completion of specific project goals and objectives.

- **Change management in project management**

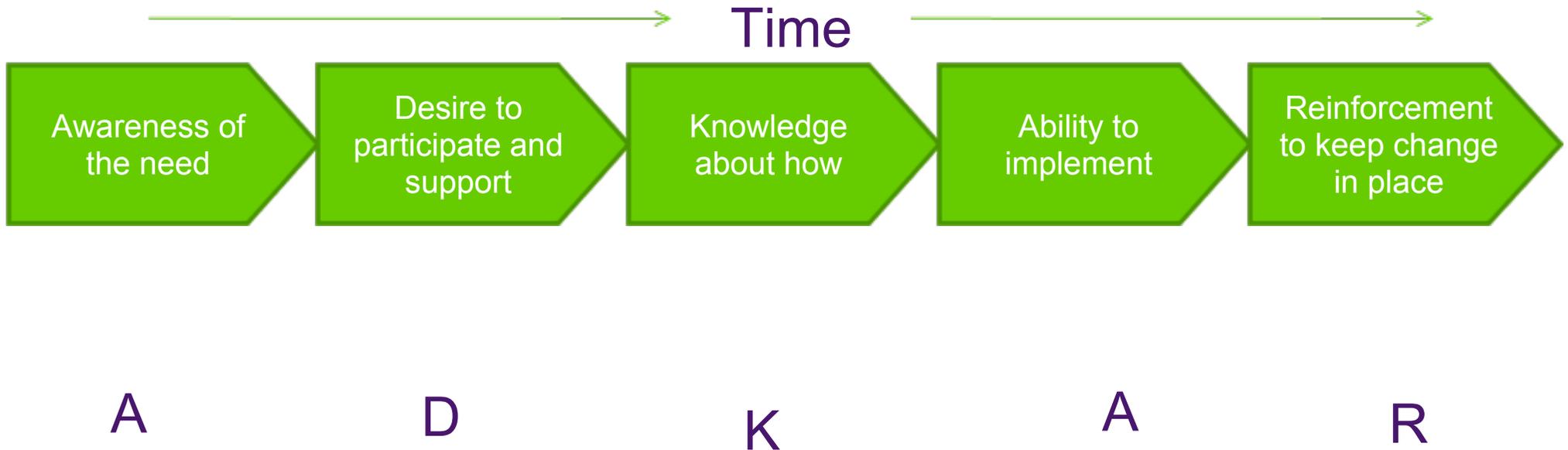
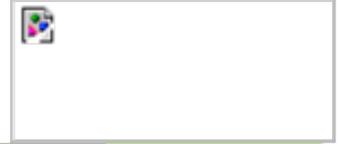
- refers to a Project Management process where changes to a project are formally introduced and approved.

ADKAR Model for Change



- The ADKAR model has five elements that define the basic building blocks for successful change:
 - Awareness
 - Desire
 - Knowledge
 - Ability
 - Reinforcement

ADKAR Change Management Model



ADKAR Model for Change

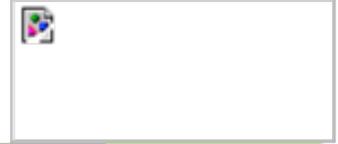


- By its nature, ADKAR is an individual change management model. In other words, ADKAR represents the essential elements of change for a single person. When a group of individuals experience change, ADKAR can be used:
 - As a coaching tool to support individuals through the change process
 - To guide change management activities like communications, sponsorship, coaching and training
 - To diagnose a struggling change by performing an ADKAR assessment



Change Management for Electronic Health Initiatives

An approach to Project Management that incorporates activities to ensure successful completion of the project as defined by full adoption of the new technology while achieving the pre-defined goals and objectives



- **Subject Matter Expert Approach**

- Unique funding
- Change management representatives
- Distinct documentation and deliverables
- Division of labour and separation of duties

- **Habitual Project Management Approach**

- Total project deliverables linked to change management progress
- Shared accountability and responsibility for change management process and habits
- All deliverables approached with adoption and change in mind
- Project management team leads change management principles and habits

10 Change Management Concepts

Have Well Defined Scope and Manage to it



- Define scope in consideration of:
 - What are the objectives?
 - Who are the users?
 - Who are the primary users?
 - What business processes are being automated?
 - What functionality will be provided?
- Common failures:
 - Project becomes unmanageable due to scope questions
 - Project structure is not representative
 - Process analysis and opportunities expand requirements
 - Activities and time lines are inaccurate and not achieved

Benefits to End User are Clear and Valid



- Establish how the new technology will help the end user
- Validate expected benefits with end users
- Consider how you plan to achieve adoption
 - End users embrace technology and buy-in
 - Mandate the change
- Common Failures
 - Assumption that patient benefits equate to end user benefits
 - Primary objectives that are administrative in nature with no consideration of end user adoption



Analyse and Validate Current Business Processes

- Effectively document current business processes including:
 - Detailed activities, sequence of steps, responsibility, data
- Identify opportunities to improve
- Validate all process analyses and opportunities with end users
- Common failures
 - Missing information about key activities, users and responsibilities result in inaccurate design
 - Lack of focus and greater time consumed when evaluating design options and deployment decisions
 - Project delays due to rework and/or major issue resolution

Use Technology to “Support” Practice not “Change” it



- Understand the details of the current state
- When defining technology requirements and/or configuring an application don't ask “how should it be done” but rather “how is it done today”
- If the current process is inefficient or challenging – fix it before you automate it
- Common Failures
 - Technology is rejected because the process changes are not accepted

Support or Improve Current Work Flow



- Evaluate technology options relative to current workflow
- Find opportunities to improve current workflow (ex: eliminate unnecessary/duplicate steps)
- Make navigation intuitive and consistent with practice
- Consider variations in practice relative to care setting
- Common Failures
 - One design fits all

Structure Project With Cross Discipline Representation



- Project team and working groups should include all end user representation
- Don't underestimate the value of any participant discipline
- Use multidisciplinary forums to discuss, validate and vet
- An issue for anyone is an issue for everyone
- Common Failures
 - Important information is missed
 - Forced to make decisions that favour one discipline over another
 - Animosity develops and focus is on user rather than best outcome
 - Greater chance of overall project failure

Manage Issues Effectively



- Receive and consider all
- Record and resolve
- Clearly communicate resolution/response
- Resolve may mean acknowledge but defer
- Common Failures
 - Stakeholders lose confidence in project
 - Trust is compromised and engagement diminishes

Solicit and Listen



- Communication is critical but must be bidirectional
- Soliciting information and feedback is just as important if not more important than providing
- Consider and evaluate project impact
- Common Failures
 - Information is missed and risks are not effectively identified
 - Solution is not complete
 - Problems persist and reduce adoption

Promise Only What You Know You Will Deliver



- Messages must be open and honest
- Saying what people may want to hear will only postpone the inevitable
- Don't be afraid to say "I don't know" when you don't know
- Common Failures
 - What is delivered is not what was expected
 - Solution is rejected even though other benefits may exceed expectations



Think of Change Management as a Process Not A Structure

- Adjust the perception that change management is a specific list of activities, deliverables etc... (ex: communication, education, training, general liaising with clinicians)
- Acknowledge that every team member shares responsibility for effectively managing change
- Common Failures
 - Project teams established in silos and change management an offshoot
 - Change management team approach has no authority to manage project processes

Thank You