Leveraging Business Acumen to Help Clinicians Get IT!

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Conflict of Interest

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Has no real or apparent conflicts of interest to report.
Agenda

- Overview of the IV and PCA Pump Project
- Our Organizational Procurement Process
- Opportunities Identified to Build “Relationship Bridges”
- Understanding Clinical Body of Knowledge
- Recognizing Need for Knowledge and Clinical Involvement
Agenda (continued)

• Building the operational, clinical business case
  – Laying the Foundation
  – Painting the Whole Picture with Valid Data
  – “Powering Up” and Achieving Organization Consensus
  – Determining ROI
  – Strategic Messaging to Build Consensus and Support for the Project
  – Value Proposition
• Facilitating Organizational Understanding of Health IT Value
• Identifying Barrier and Risks
• Lessons Learned and Key Take Aways from Our Organization
• Questions and Answers
Learning Objectives

• Apply methods learned through project examples provided to collaboratively engage clinicians in establishing channels for communication and education that strengthens financial and business acumen

• Identify activities that clinicians and informaticists can employ to ensure assigned projects are designed to be measured according to the metrics and key outcomes that the healthcare enterprise is looking to achieve

• Develop channels to identify opportunities for volunteering or shadowing senior executives beyond traditional manager/mentor engagements that clinicians/informaticists may utilize to gain insights into how decision-making occurs at executive levels using financial/business analysis
IV/PCA Pump Project

- Replacement of IV and PCA pumps across 60+ patient care locations:
  - 12 acute care facilities
  - >25 ambulatory and infusion clinics
  - Other settings such as free standing emergency departments, outpatient surgery, mobile hospital, School of Nursing, simulation center
- Replacement only
- Total of more than 6,000+ components of equipment
- IV and PCA pumps would be utilized by more than 8,500 nurses to administer more than 1M+ infusions annually
IV and PCA Pump Replacement
Historical Perspective

• Replacement of IV and PCA pumps were considered separate projects

• Implementation was scheduled facility by facility, implemented over multiple years

• Full technology benefit may not be achieved until completion of rollout

• Due to competing priorities, replacement projects can often be postponed
Our Organization’s Procurement Process

- Established an interdisciplinary Steering Committee to provide guidance, oversight and recommendations
  - Assess current state (internal and vendor assessments)
  - Determine infusion management plan/roadmap to meet current and future needs
  - Determine key functionality requirements
  - Evaluate ROI analysis; determine outcome metrics
  - Recommend vendor
  - Submit request for purchase and achieve approval
  - Implement & monitor metrics for success!
Opportunities Identified to Build “Relationship Bridges”

- Technical and Infrastructure Requirements
- Implementation Process
- Capital Process

- Clinical Workflow Requirements
- Patient Safety Impact
- Future Infusion Roadmap
Understanding Clinical Body of Knowledge

- Financial modeling and is not (typically) a component of training
- Career progression emphasizes staff management and clinical outcomes with limited business and IT systems training
- Business knowledge is not necessarily a regulatory requirement
- Need for greater understanding of interdependencies and complexities of IT systems management
In 2006, the TIGER Initiative, a nursing grassroots community recognized the need for improved preparation of clinical staff using informatics to improve patient care.

In 2011, the TIGER Initiative published recommendations of Informatics Competencies which included a focus on:
- Basic Computer Competencies
- Information Literacy
- Information Management

ANA has recognized the importance of early involvement of clinicians in technology projects (Weckman, Janzen, 2009).

“The best IT project is the one that is not an IT project” (Murphy, 2009).
Building the operational, clinical business case
Laying the Foundation

- Leverage prior successful business cases
- Identify decision makers, key stakeholders and influencers
- Connect with other healthcare systems
- Understand industry direction
- Leverage vendor(s) success stories
- Considerations for outside influences, such as regulatory
Painting the Whole Picture with Valid Data

- Clinical (Pharmacy, Nursing)
- Financial (product waste, risk)
- Safety (drug library utilization, pharmacy build, number of alerts and/or lack thereof)
- Outcomes (care events, teammate satisfaction)
- Workflow efficiencies (time and motion, LEAN, Agile processes)
“Powering Up” and Achieving Organizational Consensus

• Established Steering Committee
  – Minimum inclusion of at least 1 stakeholder from key areas impacted by project
  – Included Nursing, Pharmacy, Information and Analytic Services, Technology, Clinical Engineering, Materials Management, Procurement

• Leveraged additional supporters through key groups such as Clinical Informatics Coordinators, Physicians IT Leaders, Informatics Councils, Nursing Practice Councils and other key projects (e.g. Critical Care Leaders, Quality Leaders)
“Powering Up” and Achieving Organizational Consensus

• Supporting teammate knowledge of business, financial and strategic acumen through mentoring, formal & informal education, group learning experiences, case-study review

• Create opportunities to share the stories of success

• Create opportunities to share the thought process of prior successful projects

• Create shadow experiences for key stakeholders, decision makers
  – Rounding
  – Observations and discussions in/outside of organization
  – Informal discussions

• Create opportunities for influencers of key stakeholders
Determining ROI

• Review historic, successful key metrics
• Consider cost savings, time/efficiencies, safety, outcomes, risk, and impact to the experience of the consumer, patient, clinician and teammate
• Understand ROI is different, for different stakeholders in the organization
• Consider how each decision maker will view ROI:
  – Will individual ROI be weighted?
  – How will the project be prioritized?
• Contextualize the project into the greater system needs
• Consider how metrics will be evaluated throughout the project or post-implementation
Strategic Messaging to Build Consensus and Support for the Project

• Consider what information to present (formally and informally):
  – Fact based
  – Without emotional components
  – Focus on each stakeholders view of value proposition
  – Tie to system goals of the health system

• Consider different methods of communication:
  – Types of learners
  – Written considerations
  – Pictures and infographics help communicate complex topics
Value Proposition Definition

• A value proposition is a promise of value to be delivered, communicated, and acknowledged.

• It is also a belief from the customer about how value will be delivered, experienced and acquired.

• A value proposition can apply to an entire organization, or parts thereof, or customer accounts, or products or services.

-Wikipedia
Strategic Messaging and Value Proposition Examples

- Clinicians - Improved drug library; improved workflow with one system for both IV and PCA pumps; improved patient safety
- Pharmacy – Improved drug library management
- IT – Easier management of pump and drug library updates; improved equipment management
- Security – HIPPA compliant, US based data management
- Operations – Improved patient safety
- Procurement – One vendor for IV and PCA pumps
- Finance / Leadership – Improved patient safety, decreased risk; improved teammate experience; and decrease in cost of rental equipment
Facilitating the Organizational Understanding of Health IT Value

- Laying the foundation
- Painting the whole pictured with valid data
- ‘Powering up’ and achieving organizational consensus
- Determining ROI
- Strategic Messaging to Build Consensus and Support for the Project Developing value propositions
- …and…..
Make the (specific) Ask

• Ask for personal, department, organizational support
• Ask for approval of the project
• Ask for commitment to project success
Identifying Barriers and Risks

- “I’ve never” experiences
- Factual stories and examples are needed
- Misinterpretation of messaging
- Information not disseminated effectively

“Obstacles do not block the path, they are the path.”
Anonymous
Lessons Learned and Key Take Aways from Our Organization

• Create environment that develops business, financial and strategic acumen with clinical staff (and vice versa)

• Create formal and informal shadowing & learning experiences between clinical, business leaders and teammates for future initiatives and projects

• Create opportunities to 'share' the stories of success as well as the business, financial and strategic acumen which contributed to the success

• Make the ask!
References:


Questions

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