

Putting The Cart Before the Horse: Strategic Planning for Advanced Clinical Systems



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Practical Applications of Technology

- ◆ Reduce medication errors
- ◆ Create culture that supports patient safety
- ◆ Simplify data collection
- ◆ Provide historical and integrated view of clinical data
- ◆ Metrics for performance tracking
- ◆ Improved/Accurate charging
- ◆ Eliminate duplication



Growth of Technology

- ◆ Bedside Medication Verification
- ◆ PACS
- ◆ Forms Automation
- ◆ Ambulatory Order Management
- ◆ E-MAR
- ◆ Robotics
- ◆ Patient Care Manager
- ◆ CPOE
- ◆ Point of Care Devices
- ◆ Emergency Department Management
- ◆ Voice Recognition
- ◆ Electronic Health Record
- ◆ Operating Room Management
- ◆ Bar Coding



The Mnemonic Nightmare!



Presentation Goals



Presentation Goals (cont'd)

- ◆ High level overview of strategic planning building blocks
- ◆ In-depth view of Assessment Phase
- ◆ Functional, Clinical, Financial, and Organizational Assessments
- ◆ Advanced clinical applications
- ◆ Hands on strategic planning exercise
- ◆ Discussion





Developing YOUR Strategic Plan

“Skate where the puck is going to be, not where it is” W. Gretzky



Formulas for Success

$$1 + 2 + 3 + 4 = 10$$

HOWEVER

$$4 + 3 + 2 + 1 = 10$$



Building Blocks of a Strategic Plan

- ◆ Vision Statement
- ◆ Mission Statement
- ◆ **Assessment Phase**
- ◆ Goals/Objectives Statement
- ◆ Strategy Statement



Vision Statement

- ◆ Describes desired future
- ◆ Sketch not a blueprint
- ◆ “I have a dream”
- ◆ Substantive and significant
- ◆ Different



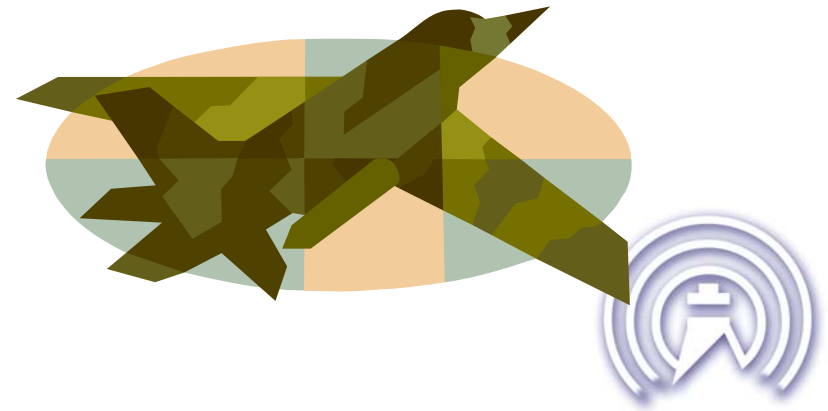
Vision Statement

“To advance the current state of XX Medical Center’s Information Technology applications and infrastructure into the future and to match evolving health system needs with emerging technology”



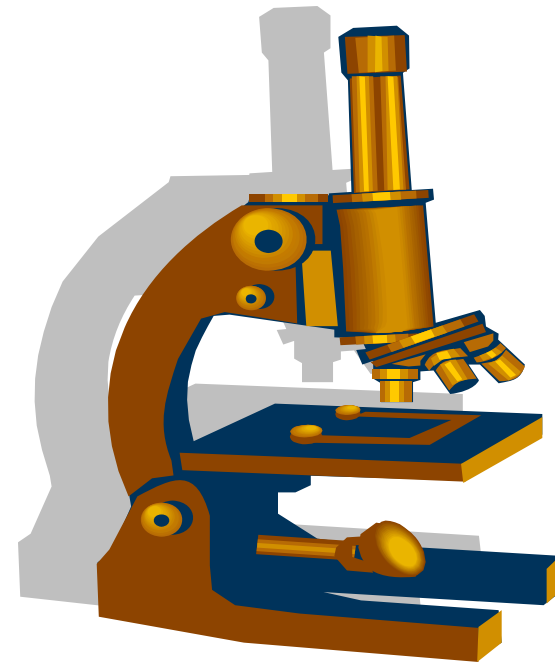
Mission Statement

- ◆ Identifies markets, customers, and competitors
- ◆ Target of strategy
- ◆ Customer needs and extent of services
- ◆ Proposed tools and resources necessary for goals



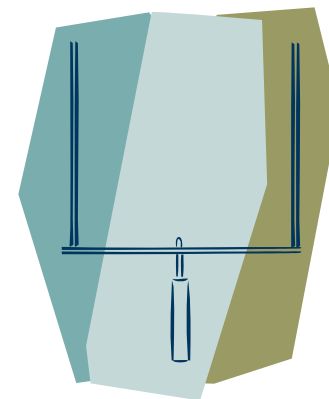
Assessment Phase

- ◆ Hard evidence
- ◆ Research
- ◆ Synthesis of literature
- ◆ Academic/Industry reports
- ◆ Interviews with users
- ◆ Interviews with vendor
- ◆ Opinions of industry experts



Goals/Objective Statement

- ◆ Defined actions
- ◆ Continuous
- ◆ 5 “W’s”
- ◆ Time sensitive
- ◆ Measurable
- ◆ Traditionally 3-4 goals but less than 10
- ◆ Hierarchically organized



Goals/Objectives Example

- ◆ “Acquire and use appropriate information technology to assist in improving clinical, financial, patient satisfaction, functional and quality of life outcomes. Outcomes to include:
 - ❖ Quality patient care at lowest possible cost
 - ❖ Decreased adverse medication events
 - ❖ Decreased re-admission rates
 - ❖ Improved patient satisfaction”



Goals/Objectives Example

- ◆ “Improve concurrent access of information on an ‘any time any where’ basis to all staff and caregivers. Continuum includes access outside the walls of the organization to other providers in the region”
- ◆ “Implement clinical data repository to provide real time clinical decision support and the foundation for a longitudinal computerized patient record and physician order entry”



Strategy Statement



- ◆ Statement of direction
- ◆ Clear and well defined
- ◆ Articulates future and immediate intentions
- ◆ Links goals and objectives to overall plan
- ◆ “The Glue”
- ◆ Presented and understood at all levels of the organization





The Assessment Phase

Four Areas of Assessment

- ◆ Financial Assessment
- ◆ Clinical Assessment
- ◆ Functional Assessment
- ◆ Organizational Assessment



Financial Assessment



- ◆ Capital Costs
- ◆ Revenue Gains
 - ❖ Improved charge capture/entry
- ◆ Cost Reduction
 - ❖ Employee resource requirements
 - ❖ Supplies
- ◆ Productivity Gains
 - ❖ reduced length of stay
 - ❖ Increase in procedure volume



Clinical Assessment

- ◆ Client Outcome Improvements
 - ❖ Reduction in medical errors
 - ❖ Improved recovery time
- ◆ Service Improvements
 - ❖ Diagnostics
 - ❖ Clinical decision making
 - ❖ Efficiency
 - ❖ Regulations



Functional Assessment

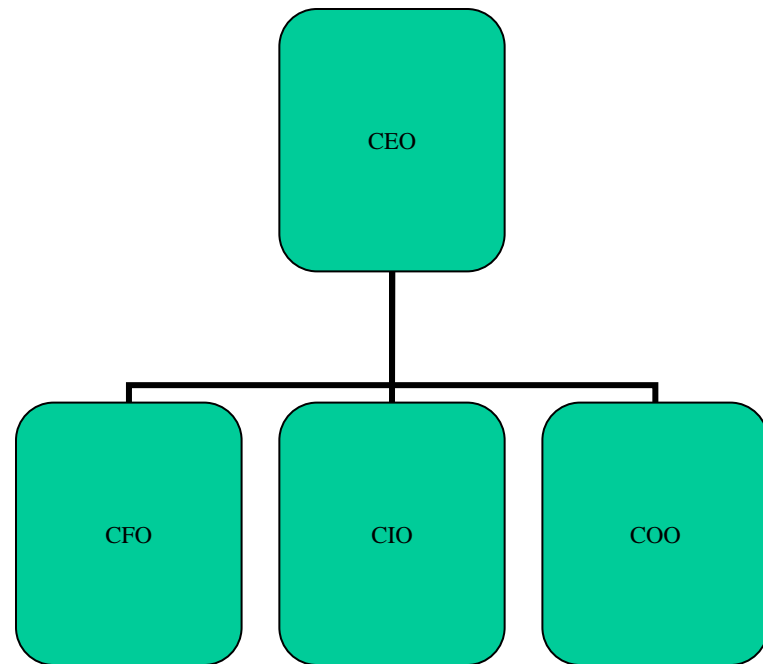


- ◆ Intended vs. Actual functionality
- ◆ Hardware/Application pre-requisites
- ◆ Implementation and support resources
- ◆ Development direction



Organizational Assessment

- ◆ Cultural impact
- ◆ Employee satisfaction
- ◆ Implementation and maintenance
- ◆ Readiness
- ◆ Structural foundation
- ◆ Staff shortages



CPOE Case Study

- ◆ What percentage of MEDITECH clients are truly using CPOE?
- ◆ Assessment Areas of CPOE
 - ❖ Clinical Assessment: Significant clinical benefits
 - ❖ Financial Assessment: Largely unquantified
 - ❖ Functional Assessment: Significant key strokes; errors in dosing sets
 - ❖ Organizational Assessment: Significant cultural change that requires full buy-in



Strategic Planning Exercise



**MEDITECH Advanced
Clinicals**

The Set-Up

- ◆ Over-view of 4 MEDITECH Advanced Clinical Applications
- ◆ 4 Sub-Plans
 - ❖ Clinical Assessment
 - ❖ Financial Assessment
 - ❖ Organizational Assessment
 - ❖ Functional Assessment
- ◆ 1 Strategic Plan



Bedside Medication Verification ("BMV")

- ◆ Increases accuracy/efficiency for medication administration
- ◆ Confirms "Five Rights" of administration
- ◆ Full integration with EMR
- ◆ Secondary check for interactions, allergies, and duplications
- ◆ On-line documentation and e-MAR suggested prerequisite
- ◆ Significant investment in hardware
- ◆ Workflow changes in Pharmacy and Nursing



Operating Room Management ("ORM")

- ◆ On-line clinical documentation
- ◆ Comprehensive electronic record
- ◆ Inventory management through MM
- ◆ Automatic bill generation for procedures, equipment, clinician rates, anesthesia/drugs
- ◆ Cost analysis reporting
- ◆ Lacks instrument tracking functionality
- ◆ Electronic preference cards
- ◆ Poor anesthesia documentation



Computerized Physician Order Entry (“CPOE”)

- ◆ Integrated information enables safe ordering process
- ◆ Dose checking, conflict checking, dose calculator, duplicate orders
- ◆ Closes circle of ordering process
- ◆ Significant organizational change
- ◆ Investment in training and support



Emergency Department Mgmt ("EDM")

- ◆ On-line documentation and ambulatory management
- ◆ Comprehensive electronic record
- ◆ Patient Tracking System
- ◆ Improved revenue with Care Level charging
- ◆ Lacks scanned images for wounds, etc
- ◆ Lacks passive tracking functionality
- ◆ Significant change in documentation culture



Results

ORM, CPOE, EDM, BMV

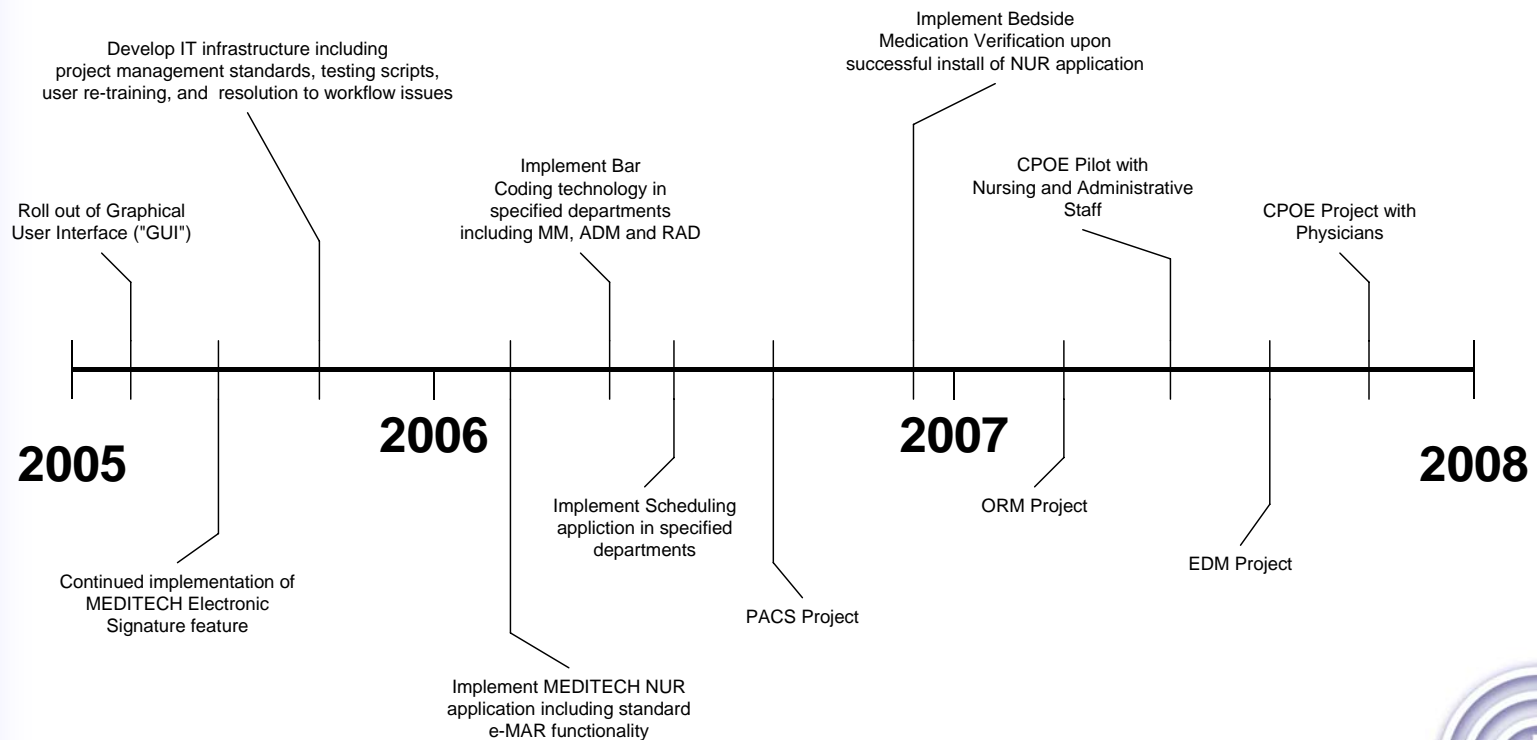
CPOE, ORM, BMV, EDM

BMV, EDM, ORM, CPOE

EDM, ORM, CPOE, BMV



Sample Timeline



Road map to success



Closing Remarks

- ◆ New technology and applications require detailed strategic plan
- ◆ Strategic Plan
 - ❖ Vision Statement
 - ❖ Mission Statement
 - ❖ Assessment Phase
 - ❖ Goals/Objectives Statement
 - ❖ Strategy Statement



Closing Remarks (cont'd)

- ◆ Assessment Phase is fundamental to success of any project
 - ❖ Clinical Dimension
 - ❖ Financial Dimension
 - ❖ Organizational Dimension
 - ❖ Functional Dimension
- ◆ No standard formulas
 - ❖ $1+2+3+4$ does not always equal 10



Discussion



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