



OVERCOMING RESISTANCE TO CHANGE

After focusing on updating their technology infrastructure and defining project goals and a timeline for their Epic implementation, OU Health recognized a need to assess the organization's readiness for change and confidence in the new technology. In parallel with the Epic deployment team, Impact Advisors collaborated with OU Health business leaders and operations stakeholders to design and execute a plan to identify barriers to change and systematically remove them. Meanwhile, the team leveraged creative techniques to generate excitement and engagement in the process of building the future.

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Epic Operational Readiness & Adoption at OU Health

OU (The University of Oklahoma) Health is Oklahoma's flagship academic health system, which includes the state's only comprehensive children's hospital, a National Cancer Institute-designated Cancer Center, the state's only Level 1 trauma center, and Oklahoma's largest and most advanced group of specialty and subspecialty physicians.

OU Health began an enterprise-wide Epic implementation in early 2020, just as the world was being introduced to COVID. Along with the early discovery that the organization needed certain infrastructure upgrades to accommodate the new electronic health record and financial revenue platform, OU Health leadership decided to pause the implementation temporarily.

About a year later, the implementation team resumed where they'd left off to take OU Health live on Epic. To do this, the leadership team needed dedicated expertise to focus specifically on adoption, operational readiness, change management, and communications to "get OU Health ready for Epic." Impact Advisors was chosen through a formal selection process to support the organization's readiness for and adoption of its Epic platform.

As the Epic implementation planning and delivery took place, Impact Advisors' consultants focused on ensuring the highest probability of implementation success.

Approach

Engaging the organization's clinical and business operations staff and helping them understand the importance of an operationally-owned, process-driven program is essential. Impact Advisors' team included an experienced operational readiness project manager, two clinical readiness specialists (one for InPatient areas and one for Ambulatory), two communications analysts, and a revenue cycle specialist who partnered with executive leaders and worked collaboratively with OU Health personnel and Epic. Leveraging OU Health's existing change management tools and methodologies where possible, as well as those used by Epic and our own proven methods, we executed a three-phase, structured program to help OU Health *prepare for change, manage the change, and reinforce the change*. Key elements of our approach included:

- **Change Readiness Assessment** to evaluate the readiness of OU Health departments and employees to successfully go-live, adopt, and utilize the Epic EHR to its fullest potential.
- **Epic Adoption and Change Management Plan** describing the steps needed to mitigate gaps identified in the readiness assessment, pinpoint the most significant workflow changes resulting from the Epic implementation, as well as adoption management efforts required for each change, and the recommended steps to prepare OU Health staff for change and ensure they stay engaged and committed to the change.
- **Communication Plan** for establishing change management awareness (e.g., audiences, key messages, modes of delivery) that aligned with the Epic implementation schedule.
- **Sponsorship Plan** for identifying key leaders or change agents who can "walk the talk," set expectations, remove barriers, and provide

education and coaching where needed to reinforce efforts of the change management team.

- **Coaching Plan** for OU Health leadership in change management principles and methods specific to Epic projects.
- **Adoption Resistance Management Plan** for minimizing, diagnosing, and managing resistance to change.

The primary tools used to measure success were pre- and post-live interviews and surveys of OU Health personnel. The first provided a baseline level of readiness and identified areas of resistance, and the latter gauged the effectiveness of change management activities and provided lessons learned for future change efforts.

Roadshows were one of the most effective ways the team generated excitement about the Epic system. In these tradeshow-style events, the team created immersive demonstrations aligned with the project's space theme and hosted over 1,500 participants.

Results

OU Health went live with Epic on time as planned, and it was considered by all involved to be a major success, especially considering the challenges faced at the start. A post-live survey captured several comments like, "I have never seen a Go-Live go this smoothly. In our command center, we were able to send people home early during the first week of Go-Live because things were going so well."

Keys to Success

The clinical and revenue cycle operational readiness specialists assigned to OU Health are certified in multiple Epic applications and have held operational or clinical roles in healthcare organizations, so they truly understand Epic's workflows and how people will be impacted by them. Leveraging their experience and expertise enabled them to lead the change activities with precision and more predictable outcomes.

Impact Advisors also brought to bear our well-established project/program management structure that includes a robust project dashboard, governance, a meeting/escalation structure, communication tools, and an issues and risk management approach, among others. The output of this structure is a near-time clear view of program status along with a proven approach to quickly address concerns as they arise. This helped the team stay in lockstep with the Epic deployment team.

Challenges

Implementing an enterprise-wide EHR is challenging under the best circumstances. The resilience of OU Health was tested early by several internal and external pressures, so rebuilding confidence among its employees that they could and would be successful was a major hurdle. To overcome it, the team continually reinforced "the why" for the project. They also communicated the schedule of key milestones and celebrated each achievement to show progress.

Another big challenge was not overstepping our role. Having successfully led over 100 Epic implementations, Impact Advisors was well-equipped to offer guidance beyond the scope of our contractual engagement. However, to avoid jeopardizing the collaborative relationship that is essential to programs of this magnitude, we only raised concerns when we felt an activity or missed opportunity was putting the overall project at risk. For example, a survey response indicated training was not focusing enough on specific workflows, that it was too generic, and not granular enough for specialty groups and roles. Although training was not part of our assigned scope of work, it does play a critical part in getting users ready for the system, so we had candid conversations about the training approach and were able to find a solution that worked for all. ■