Cloud ERP System Deployment:
The Value of an Effective Healthcare Consulting Partner

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Introduction

The value of migrating to a cloud ERP solution is [well established](#). Realizing that value, however, is not guaranteed. Healthcare organizations face several unique factors that can make deployment particularly challenging, including complex and interdependent workflows, the need to integrate with electronic health records, regulatory requirements, financial pressures, and more. This article highlights why engaging the right consulting partner is indispensable for successful cloud ERP implementation and the long-term benefits it can bring to healthcare organizations. **The right consulting partner possesses deep healthcare delivery expertise and can bring informed perspectives on best practices, streamline key business processes, and ensure seamless integration with other enterprise systems.** In short, an effective consulting partner is focused not just on implementing a technology but on helping the healthcare organization achieve and sustain transformational value from the investment.

"Impact Advisors is always engaged, and they have the right people at the right places at the right time. They really work well with me and our team. They have a good reputation amongst my peers. They are a highly professional consulting firm focused on healthcare, and I have been very pleased and impressed with their work. They bring that expertise, and they deliver. They are very good at delivering and meeting or exceeding our expectations. I have been extremely pleased with them. I would recommend them to anybody for the type of services that they are involved in."

— VP / Other Executive
KLASResearch.com, March 2025

Working with the Right Consulting and Implementation Partner

The healthcare delivery ERP market continues to evolve, with cloud-based solutions now common. Many hospitals and health systems lack recent ERP implementation experience and knowledge of the latest products, best practices, integration points, and value strategies. A successful cloud ERP implementation requires operational, clinical, and technical expertise that most providers do not have internally. The key to unlocking and sustaining value from a cloud ERP solution is to **partner with an experienced, full-service consulting firm with deep healthcare delivery expertise**.

The right partner will:

1. **Bring an informed point of view on cloud ERP planning and implementation best practices.**

A full-service consulting firm with deep healthcare delivery expertise has extensive knowledge of the day-to-day interconnected processes and workflows in hospitals and health systems. The right partner also understands how a new cloud ERP system will impact those processes and workflows – and will have an informed point of view on planning and implementation best practices rooted in experience and proven results.

Countless decisions need to be made throughout planning and implementing a cloud ERP solution. Those important decisions will have a domino effect. Many are identical for every hospital or health system. For example, one common decision point involves establishing the guiding principles and goals of the implementation. In addition, there are key data areas that need to be reviewed and aligned prior to an implementation (e.g., HR job catalog, suppliers, chart of accounts, supply chain item master, and key reports and dashboards).

When questions arise during planning, uncertainty about the best way to proceed can quickly create bottlenecks that consume valuable time, potentially risking the go-live date. An experienced consulting partner who knows and can explain proven best practices can help you understand <u>what</u> other organizations are doing and <u>why</u>. Following those established best practices will simplify the implementation design, eliminating the need for unnecessary and highly customized configurations.

One area where a broad understanding of industry best practices can positively impact hospitals and health systems is technology and integrations. A proven consulting partner can use their knowledge of common healthcare vendor offerings – and how those integrate with your cloud ERP – to advise you on how to streamline key business processes across HCM, Finance, and Supply Chain. Additionally, the right partner can encourage your business stakeholders to embrace innovation and explore a more ideal future state – one in line with what other organizations have done – rather than merely continuing current processes. One particularly critical example is understanding the full breadth of integrations between your cloud ERP and your EHR (e.g., Epic, Oracle, Meditech) to ensure that your business's clinical and back-office functions are connected to the fullest extent.

A suitable partner should have a **comprehensive perspective on best practices**, including change management, as healthcare delivery is complex and unique compared to other industries. Implementing a cloud ERP system affects stakeholders such as administrative staff, patient services, and clinicians. A consultancy with expertise in healthcare can effectively manage the transition to new systems, ensuring they are well-integrated into existing processes and promote widespread adoption among all affected parties.
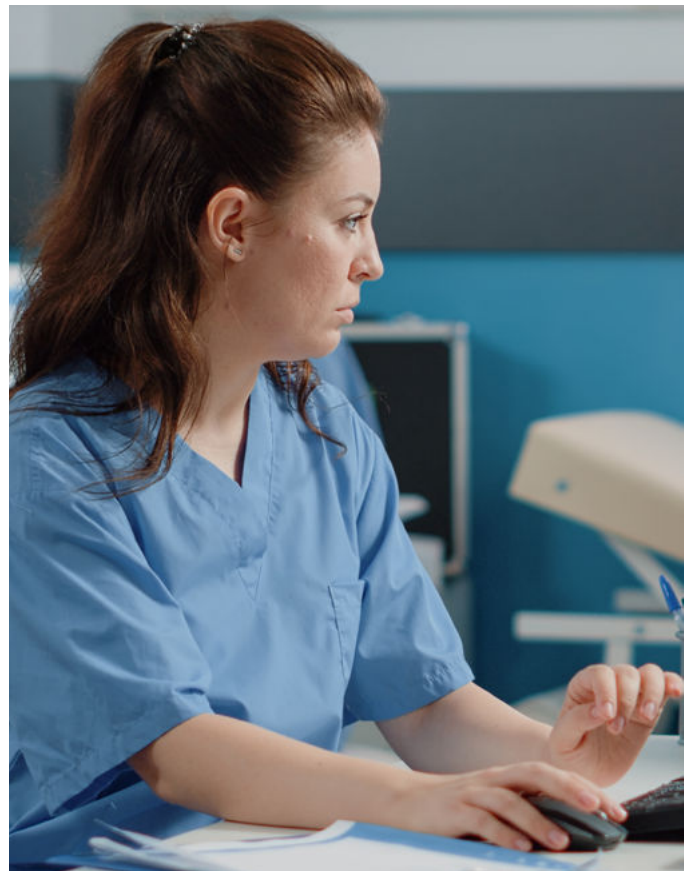
The consulting firm should be a **true partner**, imparting knowledge and experience throughout the planning and implementation process. This allows your organization to own and manage the cloud ERP after go-live, ensuring that you are self-sufficient and ready to adjust as your business requirements change over time.

Other Examples of Best Practice Goals for Cloud ERP Planning and Implementation Include:

- Attracting and retaining talent (e.g., recruiting, competitive pay practices, employee satisfaction, development through feedback and training, career path and succession planning).
- Leveraging technology to effectively and efficiently manage the workforce to reduce turnover and transform the employee experience.
- Optimizing scheduling by analyzing resource management to effectively balance the workforce by embedding technology, including artificial intelligence (AI) for sustainable processes to achieve results.
- Developing financial reporting with simplified "drill down" dashboards that contain leading healthcare-specific dimensions.
- Leveraging business process automation based on healthcare delivery best practices that ensure proper level of approvals and segregation of duties.
- Where possible, lower your system footprint by exploring how native cloud ERP functionality can render some external vendors that you use today to be unnecessary. Additionally, explore consolidation of interfaces wherever possible.
- Planning for change by ensuring both technical interfaces and functional configurations are agile and adaptable. As your organization grows, your ERP must be able to quickly adapt and scale.

2. Have deep technical knowledge to integrate ERP with other enterprise systems.

Workflows and processes in healthcare delivery are complex and interdependent. Having strong technical knowledge of cloud ERP solutions is not enough. The right consulting partner also needs substantial expertise with **the applications that integrate with the ERP**, especially your EHR. Without deep knowledge of your EHR system, a consulting partner cannot enable you to embrace the full breadth of possible integrations. Extensive experience in implementing EHR solutions is essential for a partner to be able to advise you what clinical practices in your EHR – as well as business practices in your ERP – will need to change in order to achieve an ideal future state.

The following table highlights key integration points between the ERP and other enterprise systems. It also demonstrates the importance of possessing strong technical knowledge of enterprise IT applications supporting hospital and health system workflows.

Examples of Key ERP Integration Points

Function	Integration Point	Why It Matters	System
HCM	Worker Access Requests	When new staff are hired, integration between the ERP and EHR enables hospitals and health systems to automate access requests.	EHR
	Worker Demographics	Seamless sync of hires, terminations, and worker changes from the ERP to the Time/Attendance system ensures smooth time tracking across all positions for a worker.	Time/ Attendance
	Payroll Input	Developing scalable integration to load payroll input from the Time/Attendance system to the ERP ensures workers are paid accurately, for all positions/departments where they work – and taking into account specific scenarios such as day/night/mid shift, unions, etc.	Time/ Attendance
	Absence Accruals/ Balances	Depending on client decisions, it is important to be flexible in either feeding Absence Accruals/Balances from the ERP to the Time/Attendance system – or vice versa.	Time/ Attendance
	Certifications	A critical area of the HR module in healthcare delivery is managing of certifications/licenses for clinical staff. Syncing this data from the ERP to the Time/Attendance system ensures workers are alerted before entering their time if their certifications will expire soon.	Time/ Attendance
FIN	Patient Refunds	Ensuring patient refunds that need to be paid in both hospital and professional billing are loaded into the ERP eliminates confusion for patient and insurance payees by feeding payment confirmations back to the EHR.	EHR
	Journals	Deploying scalable integrations that do the hard work of mapping EHR data to the ERP ensures that journals have accurate accounting in ERP system (and accurate trial balances).	EHR
	Ad Hoc Bank Transactions	Reconcile payer deposits for patient services against financial institution records.	EHR
SCM	Item Master HL7 Sync	When configured properly, this integration has a direct impact on clinical staff, as it controls what supplies can be entered on cases in EHR, how they will appear, and how these items' charge will be marked up before they are charged to the patient.	EHR
	Inventory Depletion	Allows hospitals and health systems to seamlessly and accurately decrement inventory in ERP after surgical cases are posted.	EHR
	Procurement & Inventory	Integrated replenishment and ordering processes, automated through integration, ensures a properly functioning supply chain.	EHR

3. **Understand how to achieve and sustain value from a cloud ERP amid the financial challenges of healthcare.**

Achieving financial stability for a healthcare delivery organization is different than other industries. Hospitals and health systems are mission-driven organizations with thin margins operating in a highly regulated market. They need unique financial planning to sustain and grow. Improved forecasting, planning, and optimized coordination with third parties will be essential for providers to run their business more efficiently moving forward.

An experienced firm should have strong expertise in implementing and leveraging data-driven financial and workforce management tools. This includes the creation of Finance and HR models to analyze different scenarios and improve performance.

Additionally, on the Supply Chain side of the house, an experienced consulting partner can advise how to ensure your item master is periodically updated and cleaned up through integration with key vendors, such as your EDI Exchange and your GPO system of record. This ultimately will lead to fewer EDI exceptions, streamlining inventory replenishment and procurement processes, resulting in fewer supply shortages and improved patient care.

The Bottom Line

Successfully implementing a cloud ERP requires deep expertise in all aspects of healthcare, extensive technical knowledge of cloud ERP and the systems it integrates with, and a proven strategy for hospitals and health systems to achieve and sustain value from their investment. Given the sheer level and depth of the knowledge required, few healthcare delivery organizations can rely solely on internal resources. **For most hospitals and health systems, finding the right partner – specifically an experienced, full-service consulting firm with deep healthcare delivery expertise – is paramount.**

About Impact Advisors

Impact Advisors is a leading healthcare management consulting firm committed to solving the industry's emerging and evolving challenges. Our high-performing team of clinical, financial, operations and technology experts collaborate to architect quality solutions and deliver measurable value for our clients. We are the most awarded consulting firm in healthcare, with services recognized among Best in KLAS® for 18 consecutive years and a culture designated "Best Place to Work" by Modern Healthcare for 15 years. To learn more about our service quality and innovative culture, visit impact-advisors.com.