

**PMO FORUM:
HOW TO DEFINE A STRATEGY TO IMPLEMENT EFFECTIVE ENTERPRISE
CHANGE MANAGEMENT**

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Problem: Change management within the hospital was tracked on a spreadsheet and reviewed weekly by several IS Managers. Conflict, overlap and risk of miss aligning critical project milestones were commonplace. Adding to this immediate need, the existing clinical order entry and result retrieval system was being replaced, which introduced multiple new interfaces between registration, ancillary and financial systems. Something had to be done proactively for effective control and management of change across the current and future technology enterprise.

The institution had no structured project management philosophy or methodology in place. Without a methodology, the first move, as well as the second and third, was in question. Are objectives well defined? Is the team moving in the right direction? In the right sequence? Is the strategy sound? Most import, will the project achieve defined objectives and ultimately be successful?

Following the principals of a sound project management strategy, the group began to put definitions to the problem and strategized on a proposed resolution. And on this day, our formal project was ready for execution.

Overview: Following project management guidelines, we established the Project Charter. Cost effectively organize and implement an enterprise change management process to include appropriate process, tools and resources. Leverage existing tools and resources where possible.

Scope: It was essential to define which hospital departments and electronic systems should be initially included. This prevented the phenomenon known as scope creep. It also dictated the composition of the change review committee. We defined the list and communicated the list to the departments, at the same time requesting “Key Contact” primary and secondary resources that might become part of the change review committee.

The project’s approach was then defined and we sketched out a Visio workflow detailing interaction between:

1. An enterprise change review committee to review, discuss, approve or deny requested changes.
2. An automated change tracking tool to collect change request information, apply status, support, scheduling and communication.
3. An enterprise change communication technology to support our process and procedure.
4. Policy and procedural definition to tie it all together.

Planning: A proof of concept was needed. After a brief search, ITIL standards were adopted for change management. This provided for immediate change management

needs and planted conceptual seeds for future IS process needs. A project workplan was created indicating effort, resources, general timeline and sequence of events. Required interaction with vendors and consultants was defined which included a look at existing systems. During this review we discovered the Support Magic® application, used by the help desk to record and track service requests also had a change management module. This module was subsequently configured and installed to track change requests, approvals and provide e-mail communication.

Risk Identification and Assessment: Some areas within the hospital felt they would be hampered by structured change and were reluctant to participate. Changes could be slowed by a complicated process which would require advanced planning. Lack of effective communication was also identified as a risk. Each risk was identified, assessed and mitigation strategies developed.

Organization: A Project Team was identified which included internal and external resources. A Change Oversight Committee was established and empowered to evaluate among other elements, preparedness, risk, scope and impact. Change schedules were reviewed and approved or denied by the committee.

Execution: The hospital took four months to establish a solid and effective process for coordinating change among some 20 different interactive electronic systems and associated interfaces. Despite many challenges, the project maintained focus, direction and momentum.

Continuous Quality Improvement: One of several strategies implemented for quality improvement was the Post Mortem. If a change did create a problem, a Post Mortem was performed to identify what went wrong, how to avoid repeats and improvement of the future process.

Lesson Learned: If the project methods are sound, it can be scaleable and universally applied to any project. It was the standards and principals of project management which helped drive the successful implementation of our change management strategy. At VCS, we focus on maintaining this level of project methodology and structure within each and every one of our projects.

If you have any questions please feel free to contact me at FEudy@getvitalized.com.