



# Technology change checklist

8

essentials to get you there

more to keep you there

# When it comes to shopping for new software, choosing the right solution is only half of the equation.

Just as important is managing the change and making sure your organization is able to realize the full potential of the technology that you're so excited to implement. And almost nothing's better at keeping you on track than a detailed checklist.

**By following the right steps, you greatly reduce your risk of encountering several common stumbling blocks including:**

- A rocky software rollout
- Insufficient or inadequate staff training
- And, most importantly, cash flow impact

# So how can you create an effective checklist to jump start and manage your change?

## You don't have to.

We've created these checklists for organizations like yours who are looking to implement a technology change. By providing a high-level framework that can be used in a variety of settings and scenarios, you're able to start with how to plan for the change and then move to managing it once it's arrived. Inside, you'll discover how to:

- Identify goals for a project that involves technology change
- Describe the roles of key team members in leading change
- Outline a technology change project plan
- Devise a technology change communications plan

As successful pharmacy and home infusion providers know, the difference between a smooth technology rollout and a frustrating one often comes down to getting your staff on board.



# Starting off right

As you start to roll up your sleeves, it's critical at the forefront of any technology project to assess needs and set goals. Take an audit of your organization as it stands today and identify what isn't working and why. Determine if the shortcomings you identified are due to a poor or undefined process, lack of talent, insufficient resource allocation, obsolete technology or something else. From there, chart your path forward by setting goals for what your new technology should address and achieve.

## But you don't have to go it alone.

**That's because at Brightree, our implementation and support teams are with you all the way.** We work with each pharmacy and home infusion customer from day one to ensure a successful go-live. That includes tailoring each implementation to your organization with workflow analysis and data conversion to meet your specific needs.

Our workflow analysis, for instance, reviews process flows from intake to collections to identify best practices recommendations based on the unique requirements of your pharmacy. Additionally, we offer consulting services to optimize your system use from the start.

After the discovery and design, build, testing, training and go-live, our knowledgeable customer support team steps in to ensure full system adoption and continued training and support. And at Brightree, that means 24/7 support staffed by industry experts. We offer the traditional methods of phone and email as well as a case portal and chat, and our defined escalation process makes sure your issues are resolved quickly. In fact, over 90% of our customers rate our support as excellent.

## 24/7 support



**Once you have a sense of your needs and how technology can address them, build a core implementation team.**

Include representation from all affected departments and appoint a leader. Set clear roles for each member and determine how you'll free up time for the team to dedicate to the project. Keep in mind a key member of this team should also be your technology vendor's point-of-contact. Depending on the complexity of the project, your vendor may assign someone to act as an adviser to your team.

Once your core team is in place, figure out how you'll involve other employees. Those with a connection to the project will be more open to change, will feel more secure in their roles and can help identify what will work and what won't. Involving employees at the beginning of a project will go far in gaining early acceptance.

As you engage your employees, remember that implementing a new technology will require commitment, engagement and effort that goes far beyond a normal work week. **Consider incentives that will entice employees to truly contribute and reward those who do.**



**Once your team is on board and you have a general framework in place, it's time to write the rules.**

Do some research to identify reasonable ROIs and which key performance indicators (KPIs) you'll use to measure success. You'll want to have planned targets but know you can expect some deviation. You can share this responsibility with your technology vendor, who will be able to help you create realistic expectations and share best practices on what has worked for other customers.

**Now put this plan into writing.** Take the time to think about how much work needs to be done and how to organize it. Once it's all written down, go through it again and fine-tune your plan — and, if necessary, your organization's expectations — to ensure it's realistic, making sure you build in a buffer for the unexpected. Many organizations find it helpful to use checklists here to support the more complex tasks in the plan.

At this point, you're nearly ready to begin implementation, but don't just flip the switch and hope for the best. Plan for a pilot by figuring out how to implement technology for a select few in your operation, perhaps a low-performing area. The emphasis at this step is on minimizing risk, establishing credibility and preparing for the remainder of the rollout.

The final step before you implement change is to plan your communications. Think ahead about who needs to know what's happening and when, and figure out how you'll communicate it. Make sure you're including communications tasks in your project plan, as proper timing is critical.

**"Brightree has been extremely supportive in helping us achieve our goals. I would definitely rate the whole implementation and support process a 10 out of 10."**

**Kristina Ohrberg**, director of billing, Advanced Pharmacy

# 8 essentials in planning change

- 1. Assess and set goals** What's not working well today? What's the reason (bad/undefined process, lack of talent, insufficient resource allocation, obsolete technology)? Assess your findings and identify project goals.
- 2. Build a core implementation team** Get representation from all impacted departments and appoint a leader. Set clear roles. Your technology vendor's point-of contact should be considered an adviser to the team. Determine how to free up time for that core team to dedicate to the project.
- 3. Involve employees** They'll be more open to change, able to identify what will work and feel more secure in their roles. Involve them at the beginning of the process and gain early acceptance.
- 4. Consider incentives** Implementing technology often requires commitment, engagement, and a whole lot of effort far greater than a normal work week. How will you entice and reward those who truly contribute?
- 5. Write the rules** Do some research to identify reasonable ROIs to avoid unreasonable expectations. Then document those rules for easy reference. How will you measure success? What KPIs will you use? Share this responsibility with your technology vendor. Have planned targets and know that you can expect some deviation.
- 6. Put a plan into writing** Use this as an exercise to think about how much work needs to be done and how to organize it. Build in a buffer for the unexpected. Fine-tune your plan — and, if necessary, your organization's expectations — to ensure it's realistic. Use checklists to support the more complex tasks in the plan.
- 7. Plan for a pilot** Don't just flip a switch and hope for the best. Figure out how to implement technology for a small segment of your operation. (Consider a low-performing area.) Minimize risk, establish credibility, prepare for the remainder of the rollout.
- 8. Plan for communications** Think ahead about who needs to know what's going on and when. Proper timing is critical so put communication tasks in your project plan.



# Staying on a successful course

With change underway, schedule regular meetings with your implementation team to talk about how the implementation is going.

Whew, your implementation plan is in place and everything is humming along. **Think the hardest part is done? Think again.** Implementing innovative technology is a major accomplishment to help you reach your business and patient outcomes goals, but you've got more work to do to ensure you maximize the benefits of the technology. We have the steps to help you keep the momentum headed in the right direction.

Start by talking about how to work together as a team to manage the change. As time goes on, bring in charts and other visuals to demonstrate progress. It's important that these meetings encourage open and honest communication so you're covering both the good and the bad.

Also communicate with employees who are not on the technology implementation team to keep them up to date on what's taking place and — once your plan is solid — when to expect it.



# It's not enough to have a plan in place

Your project will evolve and there will likely be unanticipated changes, **so make sure your plan is kept up to date.** You'll have to keep working it and using it to track progress. Look for tasks in your plan that are at risk and determine how to mitigate that risk.

Before instructing or expecting employees to use the new technology, mandate company-wide training sessions. Rushing through or shortcutting training will compromise your entire investment, which is far greater than the cost of the training itself. Train your employees well and offer different models, like live training or self-study, to ensure all are able to participate and excel.

Once training is complete, have your team members and staff practice using the technology. Give assignments and use repetition to reinforce training. Ask your team to work with the feature or system every day and ensure there are communication channels in place that will allow you to keep a pulse on how it's going.

Share the load by spreading responsibilities among your team so that your project is not overly dependent on one person. Strive to have each person focus on a small number of tasks at one time to avoid anyone feeling overwhelmed and ensure each team member has a manageable to-do list.

One of the most important steps throughout the entire process is to listen. Hear out your team's concerns and revise procedures or otherwise address them to make sure your employees remain engaged and enthusiastic.

**We all know that change is tough, so adding opportunities for some fun and recognition can go a long way.**



“The support has been excellent. How the team has been there to support us, been there to answer our questions has been wonderful. Brightree is the backbone to our business.”

**Matt Ford**, COO,  
Sail Healthcare

**Adding some humor as well as small tokens to recognize the effort everyone is putting forth solidifies team unity and provides motivation for the long haul.**

# 8 essentials in managing change

- 1. Schedule regular meetings** Meet often to talk about how the technology implementation is going. Start by talking about how to work together as a team to manage the change. Over time, use a chart to show progress towards completion. And talk about both the good and the bad.
- 2. Communicate** Communicate with staff who are not on the technology implementation team so they know what's coming and — once your plan is solid — when to expect it.
- 3. Keep the plan up to date** It's not enough to have a plan. You have to keep working it and tracking progress. Look for tasks at risk and how to mitigate that risk.
- 4. Mandate training** Don't rush through or shortcut training. That compromises your entire investment, which is far greater than the cost of the training. Train your employees well and offer different modes (e.g. live training, self-study). Train the trainer is another great approach. Take advantage of best practices.
- 5. Practice** Give assignments and use repetition to reinforce training. Ask your team to work with the new feature/ system every day.
- 6. Share the load** Share responsibilities among your team so that your project is not overly dependent on one person. Strive to have each person focus on a small number of tasks at a time to avoid feeling overwhelmed.
- 7. Listen** Hear out your team when it comes to concerns and revise procedures or otherwise address them.
- 8. Laugh** Recognize that change is tough. Humor as well as some small tokens to recognize the effort will go a long way to making this the success you had hoped for.

# So what's stopping you?

You know you need it, so what's keeping you from making that change? Historically, there are several roadblocks that can scare off pharmacy and home infusion providers when it comes to technology change. That's when these checklists – and the right implementation and 24/7 support from a pharmacy expert like Brighttree – come into play to not only help you plan for the change but to then be with you all the way to manage it for the greatest success.

When all is said and done, you'll have done a lot more than implementing a new technology or even just checking the boxes. You'll have brought your employees together and taken meaningful steps toward making your work more efficient so that you can focus on providing the best care possible to the patients you serve.

**Looking for the essentials for successful technology change?  
Turn to the pharmacy experts at Brighttree.**

For more information or to request a demo **[brighttree.com/demo](https://brighttree.com/demo)** **1.833.916.1554**

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