

Six Steps to Successful Healthcare System Selection and Implementation

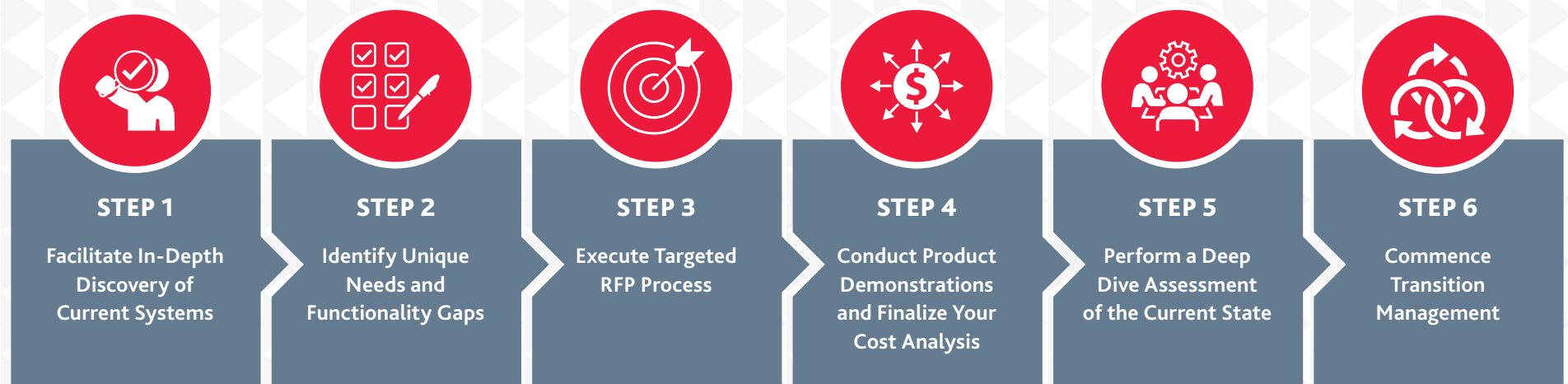


Digital enablement is critical for healthcare organizations seeking better operational performance and patient engagement. Success in today's challenging environment requires optimizing healthcare technology solutions such as Electronic Health Record (EHR) systems and practice management (PM) systems to offset the headwinds of labor shortages, rising costs, migration of care, and increased competition.

Whether seeking new healthcare solutions to replace outdated technology, support growth, or enable physicians and nurses to prioritize patient care, BDO brings proven experience and actionable insights to guide healthcare organizations through vendor system selection and pre-implementation preparation.

BDO's healthcare management consulting team outlines the most effective and efficient way for healthcare organizations to streamline their process.

HEALTHCARE SYSTEM SELECTION AND PRE-IMPLEMENTATION PROCESS



A photograph of two healthcare professionals, a woman and a man, walking up a modern staircase. They are both wearing white lab coats and bright blue scrubs. The woman is on the left, and the man is on the right. They are walking away from the camera, up the stairs. The staircase has dark steps and a glass railing. The background is a bright, modern interior with large windows and a white wall. A dark blue banner is overlaid on the left side of the image, containing the text.

TARGET SYSTEMS SELECTION TO SPECIFIC PROVIDER NEEDS

Step 1: Facilitate In-Depth Discovery of Current Systems

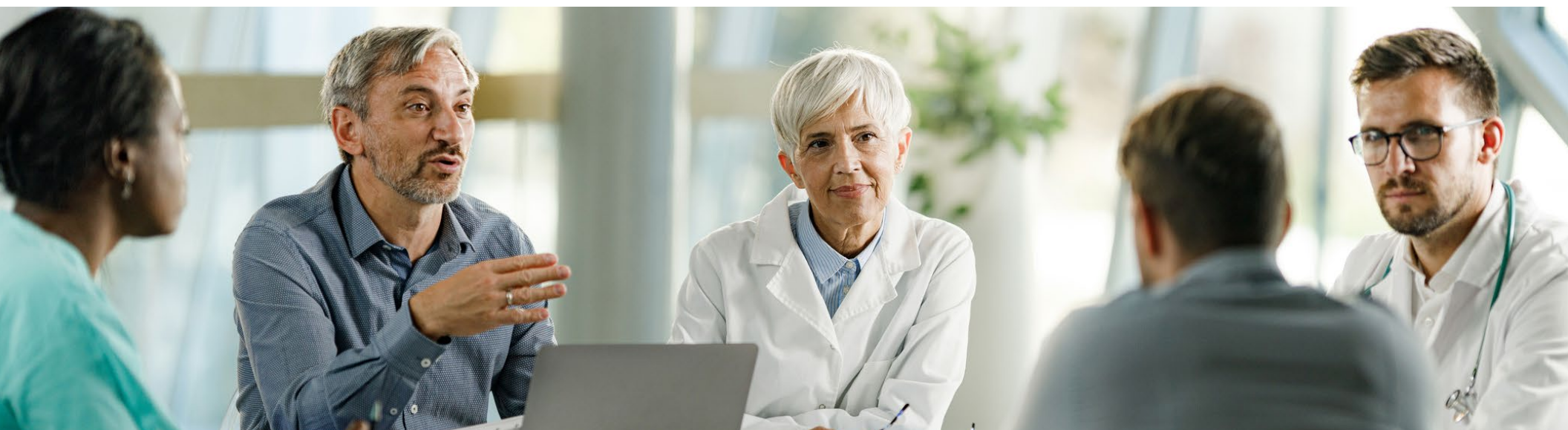
Asking the right questions to the right stakeholders provides an accurate assessment of where you are today and better informs where you want to go.

► Clean input from key stakeholders

- Solicit feedback from technology users across your organization. Including cross-functional team members ensures the technology system meets the organization's holistic needs and provides a foundational understanding of the organization's change readiness state.
- Developing specific questions by department and functional role is critical to identifying the systems needed to meet team members' daily needs. Listening to team members and understanding their issues assists in building trust for the selection process and impending change.

► Survey the current state

- Understanding the systems (e.g., EHR system and PM system) in use today and mapping the data flow and integration points allows BDO to identify potential vendors that reduce complexity as well as potential third-party systems that will stay a part of the ecosystem.
- Analyzing cost drivers (e.g., software, data storage and security, training) to support current systems is key to forecasting the total cost of ownership if our clients do not embark on new technology. This analysis provides a foundational comparison to the finalist vendors' total cost of ownership.



Step 2: Identify Unique Needs and Functionality Gaps

A comprehensive, objective acknowledgement of system shortcomings enables identification of must-have features and solution requirements.

▶ Perform gap analysis

- A thorough gap analysis is critical to set the foundation for the next steps in the process.

BDO ensures unique needs are identified and captured as requirements, which sets the foundation for RFP development and Vendor Demonstration Scenario development. Examples of questions we ask in this step include: What works in the current system? What workflow needs are missing and need to be prioritized? What is required to maintain autonomy of patient care?

▶ Envision your future state

- Gain awareness of the latest trends and market-leading capabilities in patient portals, telemedicine, population health, data management, and machine learning. Consider solutions that enable data-driven predictions and decision making.
- Articulate pain points and workflow needs that the new system should solve. Potential focus areas include enhancing patient access and experience, replacing out-of-date- systems, improving clinician experience, supporting long-term organizational transformation, and improving operational efficiency for quality care, growth, or sale if in private equity market.
- Consider how technology will support day-to-day operations and how systems will support your organization's vision for the future.

▶ Assess your organization's change readiness

- Acknowledge the growing pains of a transition and the need for retraining in pursuit of better outcomes.
- Emphasize how the system change(s) will impact your patients.

▶ Formulate the functional system requirements

- Define the requirements sufficiently/technically by function.
- Ensure the requirements align with your operating goals and meet the needs of all your stakeholders.
- Confirm the vendors targeted for your RFP have the potential to meet the requirements.

Step 3: Execute a Targeted RFP Process

Framing appropriate questions and applying vendor market knowledge ensures only qualifying systems are reviewed and considered.

▶ **Craft your RFP according to your custom needs**

- Seek responses aligned with detailed functional requirements.
- Delineate specific system features and workflow needs identified during the discovery process.
- Formulate questions to narrow the vendor list to only include qualifying solutions.

BDO is vendor agnostic. An organization's requirements and vision for the future as well as the current state of the market drive which vendors should be considered.

▶ **Field responses from potential vendors**

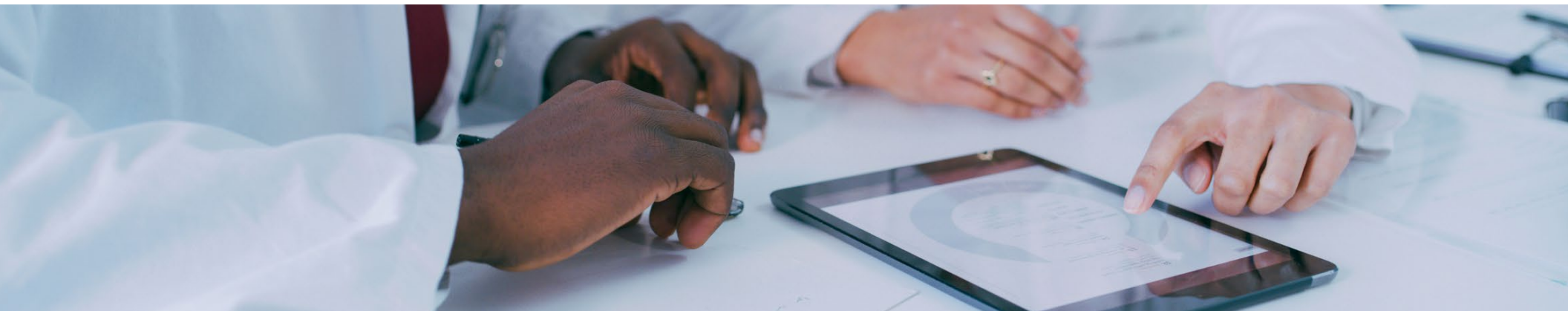
- Review vendor responses against your operational requirements and future state vision.
- Ask vendors to score themselves.

BDO asks vendors to rate individual requirements on how they compare to their competitors. We also ask vendors to advise whether their capabilities are native, require integration with a third party, are on the product roadmap, or are not available at all.

▶ **Narrow the list of potential vendors**

- Identify vendors that meet detailed, functional requirements.

After receiving responses to the RFP, functional requirements scoring, and initial Total Cost of Ownership information, BDO facilitates analysis and high-level scoring with our clients to narrow down vendors that are brought to the next phase, including vendor demonstrations.



Step 4: Conduct Product Demonstrations and Finalize Your Cost Analysis

Ensure day in the life scenarios align with identified requirements and the desired future state.

▶ **Invite select vendors to give product demonstrations**

- Move demonstrations beyond a sales pitch by addressing specific pain points.
- How does the demo align with your long-term vision for the new solution?

▶ **Update the total cost of ownership analysis**

- Create a 10-year total cost of ownership with expected inflation increases.
- Incorporate the cost of staffing (including cloud vs. on-premise costs).
- Include opportunities for application rationalization with existing solutions and capital expenses versus operational expenses.

▶ **Complete the final analysis**

- Consider insights from the RFP process, product demos, and gap/redundancy analysis.
- Determine the long-term costs of switching to particular vendor(s).

OUTCOME: SELECT NEW VENDOR SOLUTION

The new solution should:

- ▶ Fulfill your need for enhanced patient and clinician experience, modernized quality care, operating efficiency, and cost savings.
- ▶ Support your organization's long-term vision.
- ▶ Optimize your clinicians' ability to work at the top of their license.



A photograph of a meeting in a modern office or hospital setting. A woman in a white lab coat is speaking and gesturing with her hands. A man in blue scrubs is listening and looking at a laptop. Another person in a white lab coat is partially visible in the foreground. The table has a laptop, papers, and glasses of water.

HOLISTICALLY PREPARE FOR IMPLEMENTATION

Step 5: Perform a Deep Dive Assessment of the Current State

BDO's pre-implementation strategy guides organizations in establishing clear expectations and standards for transforming Access, Clinical and Revenue Cycle workflows. This allows our clients to realize the full value of system investment at implementation, thus reducing the need for immediate optimization efforts.

- ▶ **Conduct a formalized, comprehensive gap analysis of the current state vs. the new solution**
 - Integrate vendor system capabilities with your organization's goals and challenges.
 - Prioritize gaps to address to ensure you realize the full value of the system investment.
- ▶ **Prepare for the new technology**
 - Assess the impact on day-to-day clinical, access, and revenue cycle workflows.
 - Assess implications on your people and organization structure.
 - Review your revenue risk mitigation strategy.
 - Assess the current state of your policies and procedures.
- ▶ **Close operational gaps where feasible prior to system implementation**



Step 6: Commence Transition Management

A best practices approach to new system implementation involves empowering stakeholders in key focus areas across the organization.

- ▶ **Assess your governance structure**
- ▶ **Implement the needed project management and change management strategies**
 - Empower formal change leaders.
 - Encourage informal contributions from other stakeholders.
 - Ensure the availability of formal training and vendor support.
- ▶ **Implement a thoughtful communications strategy**
 - Keep employees, referral partners and patients aware of changes.
 - Deploy campaigns across communication channels to touch all those who will be affected.
- ▶ **Develop readiness plans for various work groups across your organization**
 - Promote an understanding of everyone's roles and responsibilities.
 - Prioritize the key focus areas (e.g., clinical, patient access, revenue cycle, and IT integration).



Get Started with a Dedicated Partner

Customizing the latest healthcare system technology to the unique needs and vision of your organization can improve efficiency, reduce costs, and enhance clinical outcomes. Without it, your organization is at risk of losing ground to competitors. Applying deep healthcare operational experience in data analytics and IT integration with broad knowledge of the healthcare vendor market, BDO is distinctly qualified to guide you through the critical systems selection and pre-implementation process.

BRAD BOYD

National Healthcare Consulting Leader
617-378-3634 / brad.boyd@bdo.com

ALAN WORSHAM

Managing Director / Management Consulting
703-770-1006 / aworsham@bdo.com

JULIE MCGUIRE

Managing Director / Management Consulting
713-407-3233 / jmcguire@bdo.com

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