Mastering Change Management in Long-Term Care

How Preceptors Accelerate ROI and Create a Change-Ready Environment

David Houghton, COO, American HealthTech
Executive Summary

The Challenge
Investments in large scale, high-impact projects like software implementations require dedication of both time and money. When adopting technologies, your success hinges on people.

Change management programs help relieve people of the stress that accompanies drastic change. These programs focus the impact and how that in turn impacts individuals in their daily jobs. A good change program considers these imports along with how humans adapt to change and develops resources to help them move through the change process as quickly as possible.

The Takeaway
A preceptor-based model is commonly used in nursing to connect theory and practice using specially trained, experienced nurses to facilitate change management. This model has proven highly successful in acute and post-acute environments. A preceptor program consists of:

- **Management Support** – Creating vision, setting goals, financial support, and ongoing communications
- **Identification of Preceptors** – Choosing the right people
- **Preceptor Preparation** – Empowering with the right tools, support
- **Measurement of Results** – Evaluating successes, areas for acceleration, and opportunities for improvement

The Bottom Line

Preceptors save money and headaches. Strong, agile transitions prevent:

- The need to repeat training and implementation
- Missed goals of budget and ROI
- Duplication of processes caused by mistrust and discomfort
- Persistent resistance and negativity
Building a Model for LTC: Planning for Change Management

When to Use

Implementation of an EMR system is made of three elements: people, process, and technology. Technology does not fix people or process issues, rather it highlights them. Using a preceptor-based change management program to implement technology into a facility lessens the temporary disruptive effect of the technology on the organization.

With the right technology and people engaged and committed, process can be modified to create an operationally efficient environment for focused caregiving and operations management.

More than Project Management

Change management refers not so much to tactical changes, but to how humans adapt to these changes. Humans need to adapt to new processes and new technology without it affecting daily responsibilities of quality care. Managing nurses and caregivers closely during a period of time where they may feel challenged, unskilled, and misdirected from their first priority of resident care is necessary to ensure a level of comfort is achieved. It differs from project management, in that project management focuses on tasks, while change management focuses on impacts to people and related behavior. However, good project management does not omit change management best practices.

Preceptors Defined

In nursing, preceptor programs are often used to connect theory and practice through training select resources to serve others as role models and coaches. The preceptors “merge knowledge, skills, abilities, and roles of both coaches and mentors” to develop new caregivers and help existing caregivers become stronger in their roles in the organization.

“We’re not here to train a vendor; we want a partner to push us. AHT shares our passion for details and helps us stay ahead of the curve.”

Monte Read, CEO
Bell-Mont Management Inc.
Management Responsibilities

The goal of any change management program is to lessen the impact on people during the change period. Nurses will gravitate to their passion for caring over technology every time. Management needs to balance that by creating an understanding and appreciation for technology. Without management support and full buy-in, timelines and expenses will suffer.

1. Create the Vision

Creating the vision that will be sold to the organization will become the basis for all other aspects of the EMR implementation and for change management efforts. This vision simply tells the story of why the project is happening and how it will benefit care delivery in the future. Keep it clear and uncomplicated. Focus on your vision for outcomes.

2. Set the Goals

As with any project, EMR implementation must be goal-driven. These goals are the responsibility of the management team and should address process, procedural, and competitive angles. Standardize at both the care center level and the corporate level so everyone is looking at the same version of the truth. Determine what information will need to be collected and shared to measure success.

3. Prepare for Financial Support

Providers may be tempted to save money bypassing change management or doing it alone with a lack of trained staff. Most long-term care organizations don’t retain resources skilled or equipped to architect an implementation of an EMR program or other large-impact, transformational project. Experts can shine a light on the path.

4. Communicate Clearly and Often

Management support of any program becomes evident in how well and how often communications are shared throughout the process. Enthusiasm is truly contagious. Truth builds trust and trust builds ownership. From time to time you may need to re-sell your vision. This is normal with large scale change.
Identifying Preceptors

Choosing your preceptors, or your “go-to” people who will become the foundation of the day-to-day transition process, is important. When evaluating the team to identify the best people, you may be surprised that they are not necessarily the first people who come to mind. Often group leaders may have too many other responsibilities to take on the role or are not willing to take on the responsibility.

McCarthy and Eastman offered a matrix of balancing “skill and will,” emphasizing that the right leaders in any change management program need a high degree of skill (they CAN understand the technical side of the process, have the interpersonal skills to work with others, and can dedicate the necessary time) and a high degree of will to act in the role (they WANT to be in the role and put forth the time and effort required to act as a preceptor.)

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Fig 1: McCarthy & Eastman - Skill vs. Will Matrix

“People are naturally resistant to change, and the AHT team helped us through changing our way of thinking.”

Dearl Layton, Director of IT
Presbyterian Homes & Services of Kentucky
Characteristics of a Preceptor

Select preceptors with as many of these characteristics as possible:

- Steady tempered
- Natural leader
- Consistent in actions
- Positive attitude
- Interest in learning
- Willingness to “do more”
- Technical aptitude
- Able to effectively communicate
- Demonstrates commitment to quality
- Established experience in the organization
- Ability to maintain mature, effective working relationships with coworkers and management
- Not afraid to make decisions
Preparing Preceptors

Training

In a change management program, preceptors go through advanced and focused training above and beyond other staff.

The training may go slightly beyond functional training on the application, and also may include recommendations and skill building around communication and process training to give these resources the ability to make quick, confident decisions to deal with issues as they arise. In addition, preceptors are prepared to determine if issues can be solved with internal or external interventions.

In multiple-facility implementations or projects, intentionally train consistently across facilities and preceptors. When variances occur in the training, it will become impossible to expect similar results and more difficult to identify why one facility is having a very different experience from another. Implementation, quality, adoption, and velocity across the enterprise will begin to suffer.

Solid training and support every step of the way increases comfort and confidence of both preceptors and staff.

Your preceptors may or may not be the best people to actually train your other team members. The talents of these preceptors may be better suited to help with the “noise” during implementation on the floor. Consider using vendor resources to conduct training instead.

“The word is out in the local communities we serve: we love our employees; they get cutting-edge technology. Turnover has all but disappeared. We turn away applicants.”

Doug Boulware,
Owner
Priority Management
Engagement & Support

During the EMR implementation, expect bad hair days, learn how to mitigate their impact, and celebrate successes at every milestone.

Bad Days

In large-scale implementations, some days will just feel like nothing is going right. Despite your best efforts, understand that staff may find 100 reasons to stop the project. These days challenge people emotionally. Prepare and support preceptors so they can remain positive and motivated. Choosing preceptors who are naturally constant and steady make it easier to stay on track. Your staff takes cues from your preceptors and just as enthusiasm is contagious, so is frustration and negativity. Management needs to understand that there will be days that even the best preceptors will need a pep talk, but tap into their natural ability to reason and plow forward despite obstacles.

Mitigation

Thinking through various instances such as survey during training, implementation or training can help alleviate some stress. Knowing your plan should help you face surprises, communicate instructions, and direct preceptors to switch focus onto the more urgent issue. It may be that everything comes to a screeching halt for several days. Planning can help people keep a level head and prioritize.

Celebrate

Reaching milestones in the project from beginning to end are reasons to celebrate. These celebrations give everyone a sense of accomplishment and create an atmosphere of reward for hard work. Consider building up the level of celebration as the project stays on schedule and moves closer to completion. Hold regional or onsite events that generate buzz, share successes, and continue to “sell the dream.” People fear what they don’t understand, and sharing through celebrations help the process of understanding the importance of the project and how much their dedication and hard work is appreciated.

“Just the education process alone caused us to be a better provider of care.”

Hill Fort, Vice President of Operations
Magnolia Manor
Monitoring & Benefits

When change management is successfully deployed, the results will be obvious. Facilities will know when they got it right. Monitoring the process closely for indicators of potential issues can help keep the project on track so the benefits can be realized.

Improvement Indicators

- Technology and process not right, despite employee engagement
- Identifying people who may have been better suited for a different role
- Slipping timelines
- Excessive unplanned expenses
- Breakdown in communication between management and staff
- Breakdown in communication between preceptors and colleagues
- The actual go-to resources are different from those originally identified preceptors
- Needing to constantly retrain

Hindsight always being clearer definitely applies to change management. Taking the time to understand what could have gone better allows for using the experience as a foundation for future projects.

Benefits

- Better nurse and staff experience
- Lower total cost
- Meeting time goals
- Infrastructure to support ongoing evolution of change
- Preceptors originally identified become the go-to people for staff
- Evolves into the natural habits for the organization

“We rolled it out and by the end of the week you would have not known that significant event even occurred.”

Melissa Randler, Director of Post-Acute Services
Fulton County Medical Center LTC
About the Author

David Houghton is among the industry’s leading experts in driving business performance through strategic healthcare technology initiatives. He brings over two decades of experience in leading teams who have delivered solutions and results within some of the largest healthcare systems in the world. David joined American HealthTech in April of 2012 as Chief Operating Officer. Previously, David served as Chief Information Officer for a large public company which owns and operates over 45 skilled nursing facilities across several states. Houghton has also performed in a series of strategic executive positions for international consulting firms including Deloitte Consulting LLP, The North Highland Group, and Grant Thornton, LLP.

About AmericanHealthTech

American HealthTech is Your Ultimate Connectivity Partner, connecting caregivers, partners, and healthcare networks to drive higher outcomes in the new era of post-acute care. Coast to coast, a fifth of the nation’s providers depend on AHT daily for innovations that free hands to care for others. For more information, visit www.healthtech.net.

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i Change Management Strategies for an Effective EMR Implementation, Claire

ii Nurse Preceptor Program Builder, Diana Swihart, PhD, DMin, MSN, CS, RN-BC, HCPro, Inc, 2007