TAKING THE ROAD LESS TRAVELED

BUYER JOURNEY VS. CUSTOMER JOURNEY
Health systems are plagued with communication issues that lead to patients suffering longer lengths of stay, delayed care, and higher readmission rates. Simply selecting a clinical communication platform (CCP) is not a guarantee that these issues will be alleviated. However, choosing the right partner to address communication and collaboration issues offers the sort of return on investment that improves patient outcomes and increases clinicians’ workplace satisfaction. When selecting a partner for clinical communication and collaboration needs, health systems should begin by engaging a partner who provides a Customer Journey, instead of a Buyer Journey.

A Buyer’s Journey is transactional and one-and-done. Think of it as comparison shopping when looking for an appliance or TV. Once a decision is made, the buyer has little to do with the vendor – the product is yours, as is the responsibility of setup and maintenance. Using this method to purchase an enterprise-wide clinical communication platform for a health system will lead to an unsuccessful project and low adoption rates of the new technology.

A Customer Journey, on the other hand, is transformative: It uncovers the challenges the health system is trying to improve. The Customer Journey respects that the customer knows its internal processes and people, while the CCP vendor has mastered its solution with an assortment of best practices to share. One key best practice is that the influential decision-makers involved in the purchasing decision are also a part of facilitating the project’s success. Combining customer and partner knowledge maximizes the success of the project.

The following items are what health systems should require from their CCP partner in a Customer Journey:

**Assessment**

During the onset of the project, clinical and technical experts need to outline the challenges, pain points, and goals of implementing a CCP. This consultative approach provides customers with in-depth education from the vendor’s subject matter experts, the same team members who will be engaged throughout the sale and into the implementation. A health system needs to have confidence in the partner it chooses; knowing that the project will not be transitioned to a junior team once the deal is negotiated is one way credibility is built in the Customer Journey.
During the Assessment Stage, a vendor partner needs to mine for problems: What are the health system’s communication and collaboration challenges? What are the health system’s communications needs outside the four walls of its facilities? What critical lab values need automated to which teams? Almost assuredly, there will be issues the health system has not considered that a CCP will help solve. A good partner will use its expertise to identify problems and provide options during this process.

Once the problem-solution compatibility is established, the health system’s IT and infrastructure readiness are evaluated. An onsite review completed by the partner’s technology team determines the health system’s preparedness for a CCP. The information gathered during this assessment is instrumental in developing a plan to ensure success in the platform’s deployment. Activities need to include:

- Interviews with clinical applications system analysts to understand integration workflows and needs
- Interviews with technical resources to deep dive into technical environment
- Interviews with clinical managers to understand key clinical workflows for real-time mobilization
- Clinical walkthroughs of units to review communication patterns with key clinical users

**Demonstrating Value**

With a working understanding of the challenges the health system faces, this stage of the Customer Journey illustrates how a vendor’s solution will complement the customer’s workflows and should include a nod to the ROI. The key activity for during this stage is providing documentation of the data collected from the onsite assessment for review with the customer.

The document should provide an outline of the key challenges and recommended solutions, an overview of the technical environment including current and proposed mobilized workflows, examples of the solution at work in the system and a technical readiness assessment. It should also include a scope of work that details the roles and responsibilities for a successful rollout, an implementation work breakdown structure, and an overview of the clinical, technical, and service ROI.
Defining Scope

In a Buyer’s Journey, defining scope is analogous to the decision, the end of the journey; however, in the Customer Journey, defining scope is when the partnership is amplified. Once the vendor partner demonstrates the value of the solution and the customer is aligned, the respective leadership teams need to agree on the scope of the project and how success will be measured. Defining scope is no small feat and complete alignment and transparency are critical to success.

Remember: the customer is an expert in its internal processes and people, the partner is an expert in its CCP. Both parties need to be represented to drive the project to a successful transition into the implementation. The Customer Journey allows the partner to guide the customer through an iterative process of proven best practices.

A well-defined project scope should include products with associated details (e.g., launch phases, technical call-outs), services with clear descriptions (e.g., clinical workflow consultation activities, education overviews and types), roles with associated responsibilities and time commitments, an implementation term with a high-level work breakdown structure and any relevant exit criteria, and the project change procedures if any adjustments are required. There should be no surprises in a Customer Journey.

Implementation

Implementation is where the rubber meets the road. In a Customer Journey, the partner delivers on the promises made during the sales process. This promise is realized, in part, during the planning that occurs during the implementation. Here, the partner and customer have become an official team who work to create the baseline project plan that guides the implementation.

To facilitate a common language and organization, adhere to the PMO Framework of Initiation, Planning, Execution, Monitoring, and Closing. Conveniently, some of the Initiation work begins during the onsite assessment completed by the technical team in the first stage of the Customer Journey. With many of the same stakeholders still engaged, the transition into implementation is a seamless one. During Planning, clinical workflows walkthroughs are completed; technical, education and communication plans are created; and the baseline project plan is finalized.

Download Secrets for Successful Implementations
Execution

Executing an enterprise-wide, CCP demands transparency, discipline, and teamwork. Through the first five stages of the Customer Journey, the partnership has developed a solid operating rhythm to help deliver on project plan. Key events of the Execution Stage include build and testing, and training. Once those activities are complete the main event occurs: Go Live.

With a CCP, Go Live is best completed in a carefully-crafted sequence. The cutover process is complete when change is most optimum for the clinical area. Partner teams are deployed alongside customer champions to help end users adapt their workflows with changes in shifts, making sure to address any issues or questions that arise when the CCP is deployed.

Post-Live Support

A Customer Journey is perpetual, it never ends. Once the system is live, an exceptional partner continues to provide world-class customer care while assisting in optimizing the solution. These activities strengthen the relationship between the customer and the partner and ensure continued success of the CCP and improved ROI for the health system.

The partner should provide dedicated customer care and account management, onsite workflow optimization, an aggressive release schedule that incorporates user feedback, and robust knowledge center access and updates for individuals to use for training purposes.

Read Clinical Collaboration Increases ROI

The Customer Journey

When purchasing disruptive technology, like a CCP, go on a journey with the vendor who collaborates with you. A Customer Journey is one that is consultative and inclusive, not transactional. While it may take a little longer to align, the reward is far greater than the risk of finding the CCP in your IT graveyard and poorly adopted applications. The work created at the beginning of the journey lends itself to a smoother implementation transition and a lasting partnership. What’s even better, following your partner’s best practices when implementing the new CCP will help reduce those communication issues and lead to better patient outcomes and clinician satisfaction.
Halo Differentiation

- An on-site technical assessment prior to contract development ensures an accurate pricing and implementation plan with no surprises
- After a decade, the Halo platform continues to be developed with native scheduling and communications functionality
- Halo’s unique Workflow Management System is the brain behind clinical workflow and communication efficiency
- The unified Halo platform in the AWS cloud was designed to handle the unique complexities and scale of health systems
- Identification of workflow opportunities and best practices to generate incremental revenue with the Halo platform
- Founded by physicians, Halo approaches everything it does from a clinical perspective