Choosing an Activation Partner

Key factors in selecting a high-performing at-the-elbow support partner for your EHR implementation

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When it comes to selecting an at-the-elbow support partner for your EHR implementation, all players are not created equal. Across the country there are hundreds, if not thousands, of people who make supporting go-lives their livelihood. To clear up a common misconception, all of the firms that provide go live support pull resources from the same resource pool, even if they tell you otherwise.

This paper outlines some of the key factors that you should look for from your activation and go-live support partner. It also covers what you should expect from a high performing partner with the goal of setting you up for success in your future go live.

Cost is always a factor when evaluating a service offering. As a buyer, you should be frugal with your project budget, but also recognize that this is also one of the most important and most visible phases in your implementation. When considering partners, do not decide based solely based on budget. Instead, evaluate if your future vendor partner meets or exceeds the table stakes for successfully supporting your project as well as ways that they can provide value above and beyond providing resources as outlined below.

Table Stakes

Table stakes are minimum requirements - the basic attributes that any ATE partner should possess. These include:

- *Resource Planning* – Does the vendor look at your schedules, identify gaps in those schedules, and estimate of how much support you need and where you need it. Any firm that believes this is a value-add is just selling you on their own scoping work they need to do before being able to deliver the work.
- *GPS Tracking (Geotracking) and Sign-Ins* – Again, it is the responsibility of the contracted firm to ensure the resources are onsite and in the correct locations. The major scheduling platforms for this type of work have this built in GPS validation capability such as Deputy or Shiftboard.
- *Logistics for the ATE resources* – Your team should not ever need to worry about booking flights, hotels, or transportation for any of the ATE resources. As we will explore in the differentiators below, this may be accomplished by passing on these receipts and expenses to you or through more innovative ways to attract talent and avoid mountains of receipts and paperwork on you, the client's, side of the project.

- *HR Onboarding* – Any firm in this space should be able to rapidly onboard resources through a tailored HR process including background checks, vaccinations, and drug screening as necessary for your onboarding requirements.
- *Intra-team communication abilities* – In order to perform the general management of these resources, the firm will need to have a communication tool for their ATE Support – this can be something like WhatsApp or a scheduling tool like Shiftboard. This tool can be used to get information back out to the ATE resources such as new Tip Sheets.
- *Resource Management* – There should be some level of management of the ATE resources including using shift change meetings, communication, and issue reporting to monitor amount of "noise" in different areas.
  - Includes reporting back common issues to the command center via Super User huddles, etc.
  - Includes scheduled "stair-step" planned reductions of those resources over your go-live schedule.
  - Includes timekeeping and invoicing for the work
  - Includes a basic daily status report on those "noisy" areas and recommendations.

True Differentiators

Vendors that can provide value above and beyond table stakes will create a true partnership that will result in your project success. When considering these factors, do your homework as many unscrupulous firms will claim they include some of these elements, but cannot deliver on them. Ask for references and have the firm show you examples of any element.

Quality Management

Seasoned go-live management has been the historical single deciding factor in addition to cost in choosing an activation partner. This element almost qualifies for the "table stakes" list but because there are firms that are only in it for the money and not focused on your success that may use inexperienced management, it remains as a differentiator you should look for.

Analytics, Analytics, Analytics

- *ATE Resource Analytics* – Because all of the firms are pulling from the same pool of national resources, having a firm that can identify and procure the "cream of the

crop" is essential. Just because a firm has used resources previously is NOT an indication of quality. Look for a firm that formally assesses the performance of their ATE resources and keeps track of that performance in a database.

- *Budget Analytics* – When spending significant dollars on a very fluid program where resource needs are changing hour by hour, not knowing where you with respect to budget can be unnerving and has historically led to many organizations blowing their budget on support or being surprised by huge unanticipated invoices after the project go-live is complete. Your partner firm should be able to show you where you are tracking with respect to budget on a daily basis so that dollars can be a factor in the decisions you make during the active go-live.
- *Adoption Analytics* – While the "gut feel" and "send resources to the noisy areas" method of management is table stakes, having a firm that can show a quantitative measure of adoption will give you real information on which to make support adjustments. This measurement can be used to prevent the "security blanket mentality" for some areas that may be ready for support reductions but are reluctant to accept those recommendations. On the flip side, the analytics can also show the areas where adoption is slower even when there may not be complaints.
  - The adoption analytics also offer the ability to taper resources day by day instead of scheduled stair stepping the reductions. As a fiscally responsible partner, a firm that can show you this data and taper daily will ultimately save you money through a continual right sizing of support.

Make Expenses Easy and Fair

As above, having your activation firm manage expenses is a basic expectation but this can still lead to an extraordinary amount of work on the client's side in reviewing receipts, etc. Using a firm that allows the ATE consultants manage their own logistics and expenses drives 3 benefits:

- The consultant's themselves will preferentially choose the firm that allows them to manage their own logistics and treats their consultants with respect and trust.
- The consulting firm can set up different proximity tiers for a fair reimbursement per diem to account for local vs regional vs national resources. Having a firm focus on proximity of the resources without sacrificing quality can save you expense costs.
- A simple per diem per person requires no receipts and eases the management burden on both the consulting firm and the client side.

Upskilling Your Resources

Using the camping analogy of leaving the campsite better than you found it, firms that have formal programs to upskill your employed Super Users will leave your organization in a better position for continued success. Look for a firm that has their ATE resources or team-leads engage with your Super Users and department managers to show them tips and tricks or advanced features of the application during lulls in support needs.

Hybrid Capabilities

ATE support is evolving. With the catapulted use of remote work driven by the pandemic, we are also seeing the value in "at-the-desktop" support to drive adoption in addition to the traditional in-person support. In order to accomplish this, the firm should have recommendations on where to leverage this type of support and the technical abilities to independently stand up the PBX (phone system) and collaboration platforms (voice, video, screen sharing) needed for this advanced support. Choosing a hybrid in-person and at-the-desktop model can stretch resources further and provide more immediate support to small or remote locations. The ability to do this should not need you as the client to set up the infrastructure to support this.

Additional Services Around Go-Live

Look for additional opportunities to augment your success at go-live and choose a firm that is more than a one-trick-pony:

- o AI Support – Utilizing an AI chatbot to ingest your training materials and provide self-service support can ease the burden of support on the help desk, your analysts, and your Super Users. Because a chatbot can answer up to 80% of questions asked of it, end user satisfaction can be improved through the self-service as well.
- o Concierge Personalization – Abilities to match up available trainer time with what works for a physician to personalize their experience can ease the burden of administrative overhead as well as avoid the need to staff drop in offices that may go unused.

The ability to deliver on the true value-adds while remaining cost competitive is what differentiates those firms looking to build a partnership from those in it just for the contract. There is the essence of shared success and a deep understanding of what your organizational transformation means to both your patients and end-users. The ability of that firm to draw from a full library of services means that you do not need to shop elsewhere when you have built a trusted partnership.

Project Funding

Table Stakes
- Resource Planning
- Resource GPS Tracking
- Logistics for the ATE Resources
- HR Onboarding
- Intra-team Communication Abilities
- Resource Management

Outcome:
Basic Support

True Differentiators
- Quality Management
- ATE Resource Analytics
- Budget Analytics
- Adoption Analytics
- Make Expenses Easy and Fair
- Upskilling your resources
- Hybrid Capabilities
- Additional Services around Go-Live

Outcome:
Project Success & Lasting Partnership