

Presentation Objectives

- **Motivate and prepare core project team**
 - Celebrate successes to date
 - Identify / recognize project team
- **Review Action Plan and progress**
 - Timelines, goals, project team, etc..
- **Review outcomes of Readiness Assessment(s)**
 - Aware of what risks may need to be managed and how
 - Aware of what makes their project unique
 - Conscious of how people adapt to change (transitions) and how people may respond to change and how this will impact the success of their project
- **Next steps**
 - Budget, vendor selection process
 - Further refining of Needs → selection criteria, not just functional
 - Procurement

Kick-off Presentation

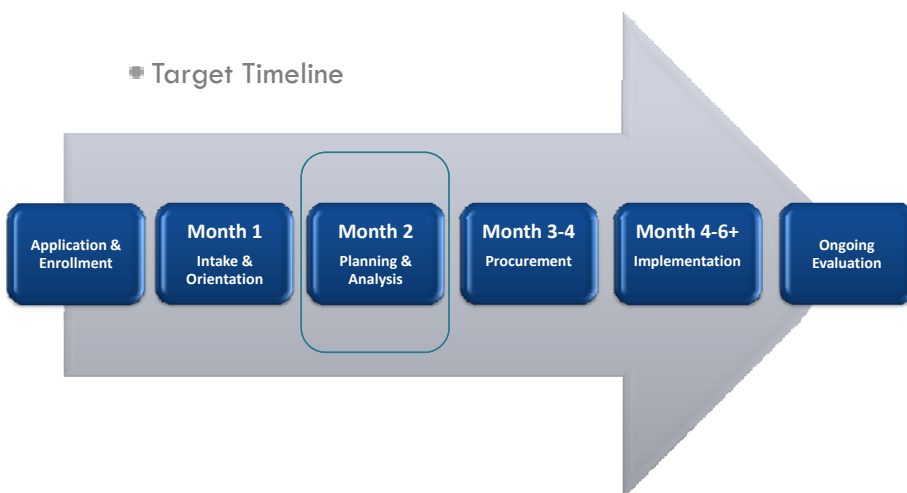
May 14, 2008

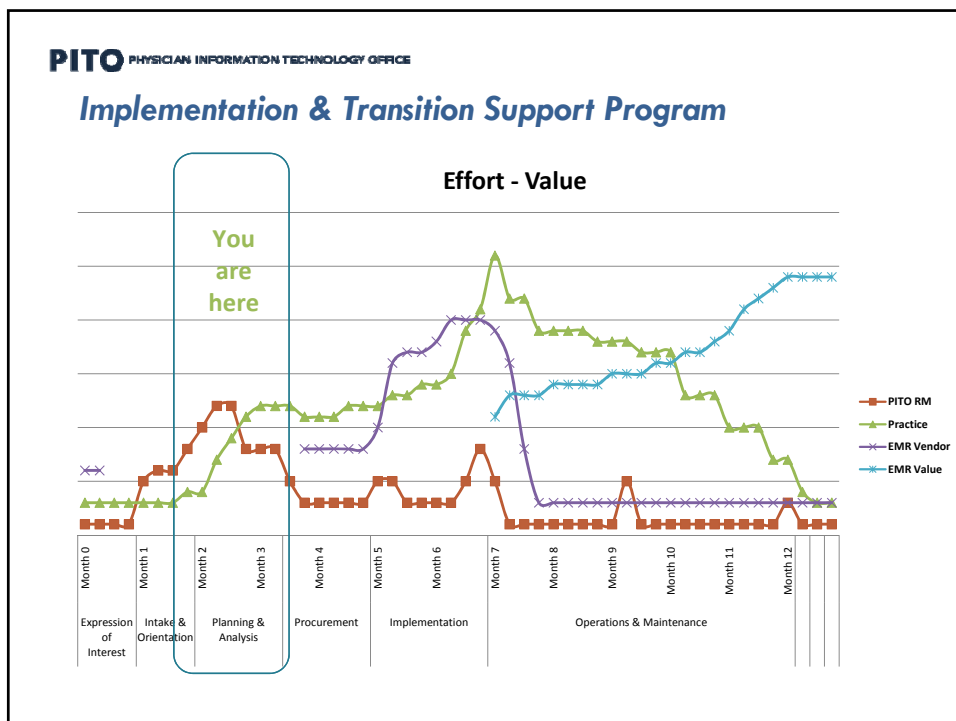
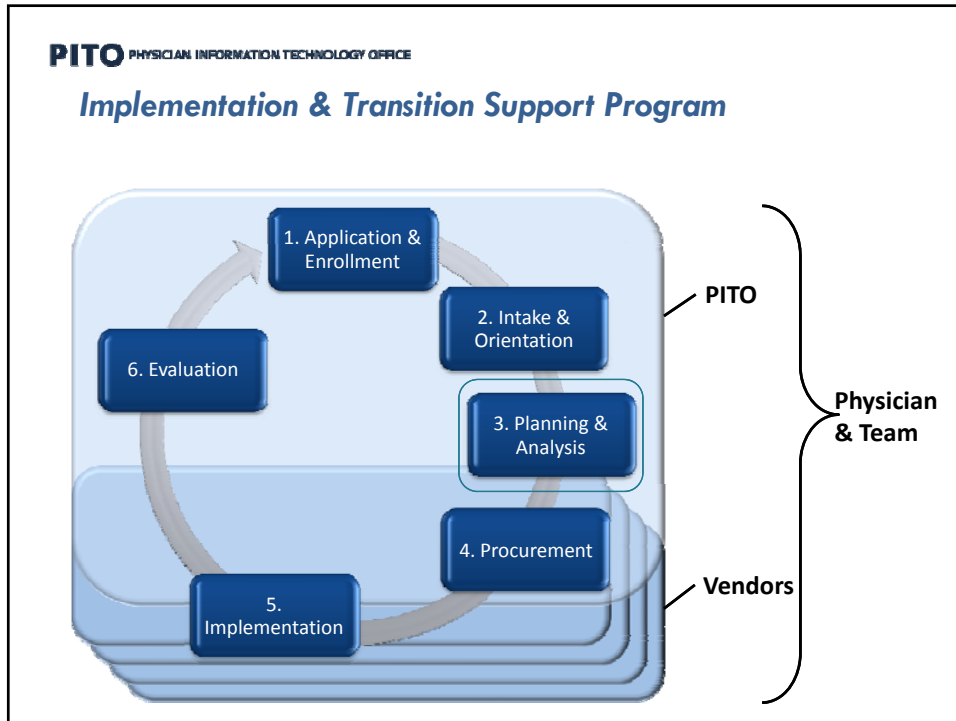
Meeting Agenda

1. PITO - Where are we now?
2. Project Updates
3. Common Project Success Factors
4. Next steps
5. Questions and Feedback

Implementation & Transition Support Program

■ Target Timeline





1. Project Updates

Project progress to date:

- Action Plan
 - <Target Go-Live Date>
- Readiness Assessment
 - What makes your group unique?
 - <List any critical dependencies, risks or issues that people should be aware of?>

Project Team

- GP Lead –
- Specialist Lead –
- Administrative Lead –
- PITO Relationship Manager –
- Other roles:
 - Application experts / Super Users
 - Information Technology lead
 - EMR selection committee
 - Communications lead

2. Common Project Success Factors

1. Managing Transitions
2. Goal Setting
3. Planning
4. Communications

Success = Transition to the new

■ Phases of a transition:

1. Ending

- "You can't steel second base with your foot on first"

2. Neutral Zone

- "Time in the neutral zone is not wasted, for that is where the real transformation takes place." – William Bridges
- "When we feel stuck, going nowhere -- even starting to slip backward -- we may actually be backing up to get a running start." –Dan Millman

3. New Beginning

- "Opportunity is missed by most people because it is dressed in overalls and looks like work." - Thomas A. Edison

Success = Goal Setting

- **What are your top 5 goals?**
 - Discussion

- **SMART Goals**
 - Specific – who, what, where
 - Measurable – outcomes focused
 - Achievable – readiness for change
 - Relevant – project team agreement
 - Time based – by when

Success = Planning

- **Planning**
 - “Failing to plan is planning to fail.” -Alan Lakein

 - “Your focus determines your reality.” - Jedi Knight

 - “Planning is an unnatural process; it is much more fun to do something. The nicest thing about not planning is that failure comes as a complete surprise, rather than being preceded by a period of worry and depression.” - Sir John Harvey-Jones

Success = Planning

■ PITO Planning tools:

■ Action Plan

- Purpose, goals, risks, resources, scope, timeline, stakeholders, communications plan

■ Needs Assessment

- Workflow review, roles, training needs, support needs
- Hardware, software, LAN, PPN, email, facilities

■ Budget

■ EMR Vendor Selection Tool

- Identify what makes your practice unique
- Identify as a group how you will rank each vendor
- Create EMR vendor demo questions (scenarios)

Success = Communication

■ Involve and communicate with your stakeholders

■ Stakeholders are:

- Impacted by change
- A source or destination of data
- Have a business interest in your practice
- A lab, pharmacy, Health Authority, MSP, patients, long term care facility, an other clinic, etc...

■ Create a compelling vision that can be easily communicated to all stakeholders

■ Celebrate success early and often!

Success = Communication

■ **Communications Plan**

- Part of your PITO Action Plan

■ **Internal Stakeholders**

- How often do you, as a group need to meet?
- How do you want to be informed and included in important decisions?

■ **External Stakeholders**

- How and when will you communicate about this project to your patients?
- Other stakeholders?

3. Next Steps

Planning & Analysis (month 2)

- Sign PITO Registration Agreement – **<date>**
- PITO Site visits, Needs Assessments – **<date>**
- Confirm project team resources – **<date>**
- Complete project documentation – **<date>**
 - *Action Plan*
 - *Budget*
- Review Privacy Guide – **<date>**
- Review and validate Needs – **<date>**

3. Next Steps

Procurement (months 3-4)

- Review **Procurement Guide** - <date>
- Decide on procurement approach
- Create **demo scripts** / situational questions
- Refine **selection criteria** – *top ten list*
- Attend **demos** and create a short list
- Continue demos with a **short list** of vendors
- EMR vendor **selection** (by committee)
- **Contract negotiation**

3. Next Steps

- Actual project timelines

Questions?

Feedback

- How can we best continue to support you?

“Coming together is a beginning;
keeping together is progress;
working together is success.”

- Henry Ford

PITO PHYSICIAN INFORMATION TECHNOLOGY OFFICE

Contact Us

PITO Office
info@pito.bc.ca
www.pito.bc.ca
604-638-2947

Relationship Manager
<NAME>
<Contact info>