

## Change Management:

### A Guide from the Medication Optimization Technologies Toolkit

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#### Description

The framework for assessing and addressing the human, technical, and clinical resources that will be required for the successful implementation of technologies in a medication optimization program requires careful management of the change process. Specifically, leadership must clearly define, communicate and share the goals, tasks, and expectations for the program, and clinical staff and other stakeholders impacted by the program (“the change”) must acquire the knowledge, skills and other resources to successfully support implementation. Key elements include assessing the organization’s readiness for change, gaining stakeholder support for the change, defining new staff roles and responsibilities as well as training needs for the on-going management of the program.

#### Audience

For organizations that have completed the program design and need to conduct an assessment of the organization’s current readiness and capacity to successfully implement medication optimization technologies into practice and to identify any requirements to successfully manage change.

#### 1 Assess Readiness for Change

*How prepared are staff and other stakeholders for process changes and the new roles and responsibilities that will be associated with the introduction of medication optimization technologies into the workflow?*

#### 2 Gain Support for Change

*What evidence will be required to encourage support among stakeholders for technologies that optimize medication use and be prepared to address any potential resistance to implementation of the program?*

**3** Define Staff Roles and Responsibilities

*What new roles or modifications to existing roles will be required to successfully manage and support the integration of technologies that support medication optimization into patient care?*

**4** Define Training Needs

*What new skills and knowledge will be required to support the operation and management of technologies to optimize medication use, and what training materials and programs need to be developed to effectively support their acquisition?*

## 1 Assess Readiness for Change

A key success factor in managing change is to ensure support for the shared vision and mission throughout the organization. It is important for organizations to be prepared for the introduction of technology-enabled interventions that optimize medication use into systems of care, and to ensure that all stakeholders have a shared vision for the program and are prepared for process changes and the new roles and responsibilities that will be associated with the introduction of medication optimization technologies into the workflow.

**Organizational leadership** – The organization’s leadership needs to clearly define and articulate the goals and expectations for the program, and communicate to all stakeholders a passion for change. Leadership also needs to be prepared to commit critical strategic resources to support the introduction of the program and ensure that the necessary financial, technical and human resources are in alignment with the requirements to successfully manage the change.

The medical director needs to review and approve that the program adheres to standard clinical protocols, continuously review and report that clinical outcomes meet the goals and expectations for the program, provide education and development support to the clinical team, and oversee provider network engagement.

## 2 Gain Support for Change

Involving staff early in the change process and identifying a champion to sponsor and lead the change effort on a daily basis are critical success factors in building support for change and addressing resistance. It is important to define the processes that will be required to support the management of the program, to identify any modifications or additions to existing care management protocols as a result of the introduction of medication optimization technologies, and to use evidence of outcomes to encourage and build continued support among stakeholders.

**Role of the program champion** – The program champion will promote the medication optimization program throughout the organization, maintain vendor relationships, and identify actions that need to be taken at a leadership level to gain commitment and ensure the successful outcome of the change effort. The program champion will use outcomes to reinforce that program goals and objectives have been met when communicating to stakeholders the beneficial impact of the change initiative and need for sustained commitment.

### 3 Define Staff Roles & Responsibilities

The introduction of patient-centered technologies into medication management processes requires new roles or modifications to existing roles for the clinical team and staff providing ancillary services to successfully manage and support integration into patient care. Staff may include resources of external vendors, and roles may be defined in the following ways:

- Clinical staff needs to address program elements related to disease management, case management, and patient health education.
- Ancillary responsibilities for program outreach and promotion, patient engagement and enrollment, and administrative program support need to be assigned.
- Technical staff controls operational and regulatory requirements related to the technology, data management and data reporting systems.

## 4 Define Training Needs

Training will transcend all change management phases, involve both internal and external teams, and be reviewed and managed on an ongoing basis to support program updates and new hires. An assessment of staffing needs will highlight any deficits in the skills and capabilities among staff and that are required to successfully implement and support the management of the program. Training materials and programs need to be developed to effectively address any needs and to support their acquisition.

**Areas of training need** – Clinical staff require training in disease management, case management, as well as patient health education and health coaching protocols to ensure standard clinical practice and organizational policies are adhered to.

Vendor training should be provided on hardware and software during implementation. Before the program goes live, and where applicable, training should be conducted to ensure proper installation of equipment in the patient's home, assistance with troubleshooting and customer service, and patient education. Customer-friendly user guides are central to this effort.