

Change Management and Organizational Development

Enhance Organizational Efficiency and Effectiveness



CME
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How will this module help me?

- 1 Simple five-step framework for enhancing organizational development.
- 2 Downloadable tools to accomplish recommended steps.
- 3 Answers to frequently asked questions.



Introduction

What is organizational development?

Organizational development centers on optimizing management, integration, improvement, and adaptability to increase effectiveness and efficiency so that an organization—in this case, a medical practice—can achieve its goals. In other words, the practice must be organized in a way that enables practice transformation to occur. Although there is a wealth of literature on organizational development in other industries, applying these principles to improve the organization of a medical practice has only recently gained traction. Four key elements will optimize success in the organization of your practice: *leadership, teamwork, communication, and metrics.*

Five STEPS to Approach Organizational Development

1. Perform a Practice Assessment.

2. Develop and Share a Vision for Your Practice.

3. Designate and Train Your Change Team.

4. Document Your Progress With a Project Management Approach.

5. Design Systematic and Sustainable Changes.



Perform a Practice Assessment.

We can now get turn-by-turn driving directions for any journey on a smart phone using only two pieces of information:

- Where are we now?
- Where are we going?

Designing a road map for practice transformation is no different. Start your work with an objective and systematic look at the current status of the practice and how it is operating. Key areas to assess include:

- Financial management, accounting, and billing.
- Personnel management, productivity, and morale.
- Clinical quality, performance metrics, and quality improvement capability.
- Optimal use of information technology for patient and family engagement, clinical care, and connectivity.

Simplified Practice Assessment

Use this Practice Assessment to get started in practice transformation

(MS WORD, 43 KB)

Q&A

Why is organizational development essential to competing in the current healthcare environment?

Some practices lack a data-driven approach to financial management, staffing, and clinical quality. Even practices associated with or owned by larger organizations with central management structures often have similar issues at the “micro-system” level, where patient care takes place. To improve the effectiveness and efficiency of your medical practice while delivering high-value care to our patients, it is important to move to a more systematic management approach in these critical areas.

How will this benefit my practice?

Feeling exhausted at the end of the day? Never really feeling like you are caught up? Perpetually late to dinner or family events? Doing more office work at night after the kids are in bed? An honest, introspective evaluation of how your practice is organized and functions is likely to yield many opportunities for improvement. In the end, ideally, your practice should be more service-oriented with improved patient experience, higher quality outcomes, increased efficiency, and additional support and encouragement to enhance the work environment.



2 Develop and Share a Vision for Your Practice.

The second piece of information necessary to build your road map is a projection of your practice's future state by considering where you want to go. Key questions to ask include:

- What are you really trying to accomplish?
- What do you want to be known for?
- What are your goals regarding patient care, efficient workflow, a team approach to care, practice vitality, and a positive work environment?
- What do you have to do to be successful as the payment system moves from rewarding volume to rewarding value?

It is often helpful to include physicians, team members, and patient advisors in creating this organizational vision. In *Leading Change*, John Kotter suggests forming a guiding coalition of a few forward-thinking, change-oriented, and positive people within the organization. This coalition then crafts a shared vision that provides a clear picture about “where we are going.” Many practices and medical centers share their vision statements online so everyone knows what is guiding everyone who works there.

Guide to a Practice Visioning Session

Use this guide to help your practice develop its vision, goals, and action plan

(MS WORD, 40 KB)

Communicate the vision and engage others.

Once you have clearly defined the vision for practice transformation, it is critical that everyone else in the organization understands the new direction and the desired future state. Practice leaders must clearly articulate the vision and discuss it often. A clear and compelling vision can be a real motivator for change, but it must be “front of mind” for all. Signs, posters, or tag lines provide reminders that the practice is undergoing change

together and moving towards providing more efficient and higher quality care for patients. Start or end **team meetings** and **huddles** with a reminder of the practice's vision.

With a clearly defined vision of your destination in mind and engagement from everyone in the practice, you can then establish very specific aims and goals with designated timelines.

Q&A

What if we have team members who work in multiple offices?

The team in each location should buy into that location's vision and fit their culture. Sometimes, if a nurse or medical assistant floats to an office and reports to a divisional leader somewhere else, they may not completely participate in or engage with the transformative work that is happening at each place. In this scenario, it would be ideal for everyone to report through their local team, so they have more interest in the practice's efforts and can actively participate and contribute to the transformation efforts of the team.

3

Designate and Train Your Change Team.

One of the most important steps you can take in developing your practice or organization is to identify a small team to take on the responsibility of managing and monitoring change. Typically, the change team should be a group of 3 or 4 individuals with the interest and aptitude to lead the effort. In a single-physician office, it may be best to involve everyone. Make sure they have the time and resources available to do this important work while still meeting their patient-care responsibilities.

It is likely unnecessary to send everyone to **Lean** or Six-Sigma Black Belt training, but some reading or online education about the basics of quality improvement and change management will speed up the effort and help the team avoid common mistakes. In order to create an environment where meaningful change can occur, it is essential that everyone—both within the change team and in the practice as a whole—feels safe in suggesting improvement opportunities that can then be properly evaluated and tested before full implementation.

Guide to Assembling Your Change Team

Use this guide to establish and communicate the vision of the future practice.

(MS WORD, 40 KB)

Q&A

Who should we include on the change team?

Members of a change team should be identified based on their roles and the nature of the change effort. A multidisciplinary change team may consist of physicians, nurses, medical assistants, as well as representatives from administration, registration, information technology, and/or compliance. At various points throughout the change process, the team may engage additional experts in **Lean** approaches, financial management, **behavioral health**, and care management who can aid in executing the new model.

How will most of the transformation work be completed?

Having an organized and systematic plan for change will save a significant amount of time and effort. Just as you rely on your care team to help with patient care, you will need to entrust the majority of the office re-organization work to your change team. Physicians generally cannot devote large blocks of time to

change initiatives. Rather, the physician can allocate resources and oversee the projects while the change team implements any interventions.

4

Document Your Progress With a Project Management Approach.

If your practice has never used project management in implementing a project or initiative, you may not have an appreciation for what a huge help it can be in organizing the team, the work to be completed, and tracking progress. You do not need to invest in expensive project management software to manage your organizational change initiatives. Simple approaches go a long way toward reaching goals on budget and on time; even using a one-year wall calendar to document project milestones, responsibilities, and resources can keep the initiative on track and ensure that the practice's time and effort are not wasted. Tracking the progress of a complex project ensures that all of the project elements progress on time and in sync. The project manager can aid in resource allocation, foster accountability, and help everyone appreciate the daily progress even when the final outcome may still be a distant vision.

[Project Management Worksheet](#)

Use this worksheet to help your practice organize its approach

(MS WORD, 39 KB)

5

Design Systematic and Sustainable Changes.

The natural human tendency when faced with a problem is to fix the immediate issue. Yet, one of the hallmarks of a great organization is that, when faced with a quality problem or a performance issue, it looks at systematic solutions that can be implemented over the long term to reduce errors and poor results. High-functioning organizations do not implement “band-aid” fixes. Furthermore, to be successful in a rapidly changing world, the organization must develop a “measure...improve...measure” mindset (e.g., a [Plan-Do-Study-Act](#) improvement framework) that sets the stage for continuous needs-identification, the development of potential solutions, and a method to evaluate their effectiveness. For lasting change, begin to think about systematic solutions such as:

- [Registries](#) for chronic condition and preventive care management.
- Patient portals and secure email to reduce phone traffic and engage patients.
- Protocols for prescription refills and order entry.
- Video visits and e-visits to supplement face-to-face interactions.
- Quality measures embedded in the electronic health record to enable constant feedback regarding clinical performance.

[Guide to Process Mapping and Redesign](#)

Use this guide to identify inefficient workflows that can be improved

(MS WORD, 46 KB)

Conclusion

Improving organizational efficiency and effectiveness requires substantial time and effort, but the end result is worth it. The alternative is to continue on the same path, encountering the same frustrating issues day after day. The goal is to develop a culture of improvement that supports an iterative process where everyone is identifying better ways to get the practice's important work done. The result will be a medical practice that is more service-oriented for patients, more effective for better patient outcomes and more efficient for a better bottom line, producing a more fun work environment for all involved.

Learning Objectives

1. Identify steps to develop and implement a vision for your practice
2. Explain how to create and train an organizational change team
3. Summarize methods to track the progress of change initiatives using a project management approach
4. Discuss ways to establish systematic and sustainable changes in your practice

Article Information

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