# Change Management in Nursing Informatics

Sophia F. Brown  PhD, MSN, RN-BC, CPHIMS, PMP  I  Browns1@mskcc.org

Memorial Sloan Kettering Cancer Center

Memorial Sloan Kettering Cancer Center

WeCARE — Every day. Every way.

MAGNET RECOGNIZED — AMERICAN NURSES CREDENTIALING CENTER

## Introduction

### Background

The ever-increasing implementation of electronic clinical systems has highlighted the need for informatics nurses to develop project management skills and adopt successful methodologies to address change management.

Additionally, strong leadership is required to establish a shared vision and provide clear guidelines about how to ensure that requested changes align with the organizations' strategic goals.
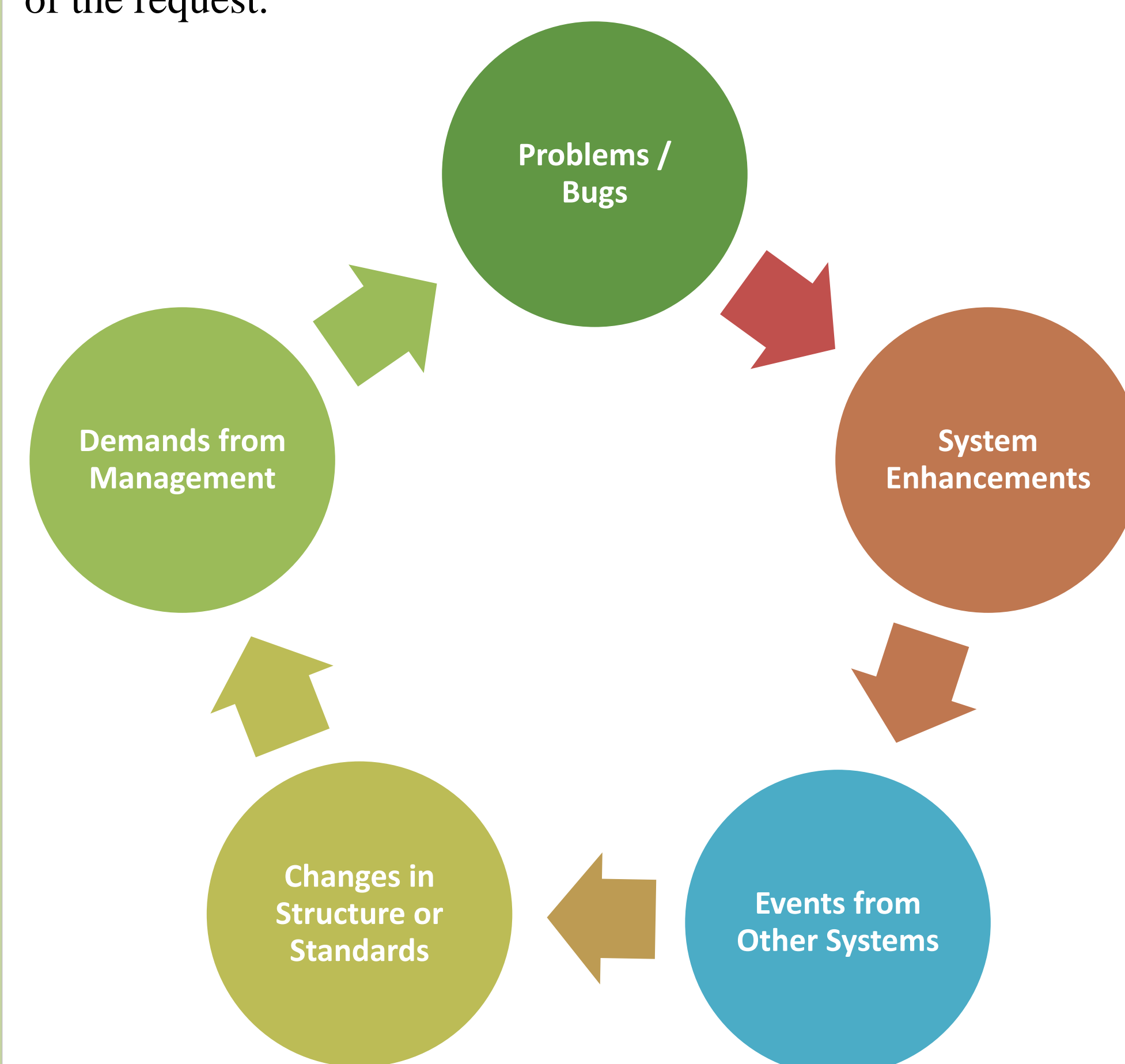
### Definition & Goals

Change Management is a process that introduces change in the most effective and efficient way possible. It takes a planned structured approach to align the organization with the change.

Well Managed Change Results in:

- ✓ Increased Productivity
- ✓ Sharper Focus
- ✓ Greater Job Satisfaction
- ✓ Stronger Team Work
- ✓ Improved Team Morale
- ✓ Increased Stakeholder Satisfaction

### Drivers for Change

Requests for changes has different drivers and comes from various sources. Effective change management promotes a structured way of managing all changes regardless of the origin of the request.

Problems / Bugs · System Enhancements · Events from Other Systems · Changes in Structure or Standards · Demands from Management

## Objectives

- ✓ Assess the need for a standardized change management process
- ✓ Understand the change request life cycle
- ✓ Identify components of an effective process needed to support the stages of the change request life cycle
- ✓ Define the role of communication in change management

## Needs Assessment

### Survey

An online survey was conducted within the Nursing Informatics department to determine how requests for changes are currently captured, tracked, assigned, approved and managed.

Findings:

- ✓ No standard or centralized way to capture change requests
- ✓ No standard way to track or follow-up with requestors
- ✓ No systematic process for assigning change requests
- ✓ No standard way to get approval for change requests
- ✓ No centralize management of change requests
- ✓ NI staff would welcome a standardized way of handling change requests

## Change Request Process

### Change Request Life Cycle

COMMUNICATION

**1 Request Received**
Change Request Form
Communication Plan
Triage Process

**2 Impact Analysis**
Impact Statement Template
File Management

**3 Approve or Deny**
Approval Pathway
Approval algorithm

**4 Implement Request**
Nursing Informatics Checklist
Stakeholder Checklist

COMMUNICATION

## Application

### Request Capture

Capture all changes in a central location using a standardized form. Consider obtaining: change description, the justification for the change, policy impacted, etc. Communication: when a change request is received, an automatic notification is emailed to the requestor to confirm receipt of the request. Periodic automatic emails are sent throughout the process as the change request transitions through the life cycle

### Impact Analysis and Approval

Change requests are reviewed by a triage team who assess for completeness and conduct an impact analysis. The priority of the change is assigned based on the severity of the impact and the number and quality of resources utilized.

The structure of the approval process conforms to the shared governance philosophy of the organization.

- ✓ **Low Impact** - Nursing Informatics Project Managers
- ✓ **Medium Impact** – Departmental Councils
- ✓ **High & Critical Impact** - Executive Nursing Council

**5 X 5 Change Request Risk Matrix**



Nursing Informatics Resources Increase (personnel, time, cost, expertise): Very Low 1, Low 2, Medium 3, High 4, Critical 5

Risk Increases in this Direction

Severity of Impact Increases: Very Low 1, Low 2, Medium 3, High 4, Critical 5

Approvers: Project Managers · Department Council · Executive Council · Executive Council

### Implement Request

When the requested change is developed and tested in a non-production environment, required sign-off is solicited from an appropriate stakeholder.  Once the sign-off is received, the NI Project Manager:

- ✓ Updates project documents as needed (status log, change log, training plan, affected policy checklist, lessons learnt log).
- ✓ Develop training documents and conduct training.
- ✓ Communicate when the change will be implemented in production
- ✓ Prepare practice alert notifications about the change for broadcast to the affected stakeholders.

## Discussion

Request for changes are more manageable when there is:

- ✓ A structured way to capture request for changes
- ✓ A formal process for submitting a change request
- ✓ A formal approval process which is aligned with the organization strategic objectives and supported by management
- ✓ A systematic process for managing and implementing the approved change request

Communication is a key factor in change management. All change management processes must be backed by a robust communication plan as this will encourage buy-in and provide clarity. Communication should be done early, often, and consistently using a variety of communication channels.

Effective communication results in:

- ✓ Informed stakeholders
- ✓ Increased sense of shared vision
- ✓ Improved management of stakeholders expectations
- ✓ Increased stakeholder engagement and involvement

## Conclusion

- ✓ As technology-rich departments like nursing informatics and information technology embark on the challenge of addressing frequent changes to existing technological systems within organizations, it is important to standardize the change management process.

- ✓ Having predefined steps and support documents provide clarity for all staff involved in the change process and assist in managing stakeholder expectations .

- ✓ Having a structured, standardized approach to manage change requests  will optimize resources utilization, increase efficiency, clearly communicate mission and values and lead to the seamless integration of the change within the work environment.

## References

- Project Management Institute (2013). Managing Change in Organizations: A Practice Guide. Project Management Inc ISBN 978-1-62825-015-2
- Griffin-Cooper, B., & King, K. (2007). The Partnership Between Project Management and Organizational Change: Integrating Change Management with Change Leadership. The Performance Improvement, 46(1), 14-20 DOI:10.1002/pfi
- Lorenzi, N. M., & Riley, R. T. (2004). Managing technological change: Organizational aspects of health informatics, 2nd ed. New York, NY: Springer Science and Business Media.
- Ziemba, E., & Obląk, I. (2015). Change management in information systems projects for public organizations in Poland. Interdisciplinary Journal of Information, Knowledge, and Management, 10, 47-62.