Introduction

Background
The 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 have different drivers and come from various sources. Effective change management promotes a structured way of managing all changes regardless of the origin of the request.

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 centralized management of change requests
- NI staff would welcome a standardized way of handling change requests

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

Change Request Life Cycle
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’s 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