Scaling Up a Physician Education Program Led to Efficiencies for a Large Health System

The client's goal for this project was to improve the administration of their patient communication training program to enable it to grow and adapt to future demand. The first step was to conduct an assessment of the program to fully understand all of the challenges the program faced.

Situation

Our integrated health care delivery system client started a patient communication training program for their physicians a few years ago. The program started as a small, grass-roots effort providing a few classes to physicians. The purpose of the classes was to improve the patient experience in the exam room and thereby raise patient experience survey as well as physician satisfaction results. The scores started to improve and the demand for classes increased significantly year over year.

Freed Associates had worked with this client on a number of projects over the years and they contacted us to discuss their concerns. The client's program team and tools to support this physician education program had not grown to meet the increased demand for more classes across more geographic areas. This was impacting the

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efficiency and effectiveness of the training program team, costing them time and money. After talking with them to clearly understand their needs, Freed was engaged to partner with our client to assess the situation, develop recommendations, and implement solutions to these challenges. They needed to make improvements before a negative perception about managing this program spread across the organization.

Solution

The client's goal for this project was to improve the administration of the program to enable it to grow and adapt to future demand, preferably with the existing staff. The first step was to conduct an assessment of the program to fully understand all of the challenges the program faced and then make recommendations for positive change. The assessment involved interviewing leadership and staff at all levels who were involved in supporting and delivering classes.

The courses consisted of one training session, four follow-up sessions, and one-on-one coaching.

The Program Manager was responsible for managing all aspects of the Physician Communication Training Program, including the annual planning cycles to prepare for the following year's courses. The Lead Trainer maintained course content, worked with physician groups on their training needs, and directed other trainers and coaches using a very unwieldy project plan. The Program Admin Assistant handled logistics for meeting invites and coaching appointments using mostly manual lists in different forms. This team, along with the Vice President and Director leadership positions, met frequently to keep the program running as smoothly as possibly.

The assessment found many areas of opportunity categorized as follows:

• Tools – project management and tracking capabilities, project dashboarding and capture of program data and metrics were either minimal or needed streamlining

• Processes – standardization and documentation of all processes was needed to improve efficiencies and take advantage of the SharePoint automation

• Resources – roles and responsibilities were not clearly documented and resources were not allocated effectively

• Value – program goals and objectives were not documented and the value of the program to the client's organization was difficult to communicate

Results

This department was already using SharePoint and Freed proposed that they take advantage of the tools they already had to resolve many of the project management and data capture issues. After a session to show the minimal new training and maintenance required, the following was agreed to:

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1. Store all program contacts in SharePoint: This was done via Outlook and streamlined the process for tracking 40+ contacts who support the training program and centralized the storage of their information.

2. Import Tasks from MS Project to SharePoint: This allowed the support team and trainers to manage their tasks via Outlook due to the connectivity between the two applications. This saved the project manager from having to constantly follow-up with task owners on status. This also helped to automatically prepare agendas for their weekly and monthly meetings.

3. Migrate all class participant data into SharePoint: This set the foundation for capturing program metrics and enabling automation of meeting invites, surveys and certificates for the over 900 participants.

4. Import the schedule for all of the classes in the upcoming year into SharePoint: This allowed centralized calendar views of the schedule, contributed to the creation of metrics, and enabled automation for administering the classes due to the integration of the other class data.

5. Automate the creation of three different classroom forms required for each class: The time it took to create these forms went from 40 minutes to about five minutes. For nine times per month, this saved at least five hours for the Program Admin Assistant.

6. Create a SharePoint log for capturing risks, actions, and decisions: This ensured a central place to capture these items and a standardized method for recording them and the associated meta-data. This saves everyone time every week as they follow up on actions.

7. Move and organize all current documentation for the program to SharePoint: Examples included letter templates, process flows, roles, and responsibilities, organization charts, marketing materials and planning documents. This provided uncluttered and easy access as compared to a shared drive.

8. Create a Team Calendar in SharePoint: This contains various internal calendar items such as Team PTO, Ops, and Strategy meetings. Meeting invites are now emailed directly to this calendar for a constant up-to-date view by all program staff.

Conclusion

Having all the program management tools and data maintained in one SharePoint location allowed the team to gain efficiencies while scaling up the training program for more classes and participants. The existing staff had updated roles and responsibilities and followed standardized processes, which were much more automated and easily maintained. These gains allowed the client to better illustrate its value to the organization and their network of physicians and be assured they were prepared to handle the future demand for their classes.

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