

A Guidebook for Managing New Clinic Openings



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Problem to Solve

A major, well-regarded health care system sought to expand its clinical presence to meet growing patient demand and expand its market share and geographic presence in a highly competitive region. Despite this system's patient care acumen, it struggled operationally when opening new clinics.

The system's recent opening of a new clinic in a neighboring community, part of a strategic alliance with a local community hospital, had not gone optimally. Staff members were confused, details were missed and unsurprisingly, the planned clinic opening was delayed. The clinic eventually opened, but not without considerable additional effort and resources.

With the system planning four additional clinic openings in the near-term, its leaders knew they couldn't afford a repeat of their prior clinic opening issues, financially or reputationally. Considering the number of new clinics the system needed open, as well as the system's longer-term plans for additional new clinics, the system's leaders knew they needed an operational guidebook to help manage new clinic implementations.

Lacking the time or resources to produce a new clinic guidebook on its own, the system turned to longtime consulting partner Freed Associates (Freed) to direct the process. Not only was Freed familiar with the

organization's business and culture, it also had considerable operational and project planning experience to oversee an effort like this.

Strategy and Tactics

What the health care system originally thought to be a straight-forward project to create a clinic opening guidebook turned out to be far more complex. As Freed dove into this assignment, an unforeseen and significant strategic change occurred that required the system's executive leaders and Freed to readdress several critical pre-implementation tasks.

The guidebook implementation project that was in the "build" phase took a huge step back to the requirements-gathering stage. This change in scope gave Freed the opportunity to start at the beginning to learn and document the many pre-implementation steps required during the planning and financial assessment phase, and provided a more robust roadmap for other clinic openings to proceed more smoothly.

Among the most notable pre-implementation tasks that needed to be addressed:

- **Real estate due diligence** – This includes a property inspection, check of zoning laws, title research, appraisal, environmental assessment, and more.
- **Operational due diligence** – Factors in the specific operational and space requirements of the clinic's users. For example, an otorhinolaryngology clinic would need areas for sterile processing and an audiology booth; is there sufficient room and configuration for each?
- **IT and clinical due diligence** – Before a clinic can be configured, the system's IT and clinical technologies departments need to be consulted to determine the specific equipment and resource needs for that particular clinic.
- **User experience input** – The needs and interests of the clinic's users and patients need to be factored into the clinic's layout, design and configuration.
- **Infection prevention** – How will this clinic be laid out and designed to provide proper infection prevention?

As Freed worked to establish guidelines to pre-implementation tasks like these, it was also simultaneously gaining first-hand input from other clinics in the system. A Freed consultant shadowed an operational lead overseeing a large primary care and multi-specialty department implementation. The goal was to determine what was working well, and just as critically, what was not.

As Freed compiled information about every aspect of a clinic's operations for the clinic opening guidebook, the system proceeded with plans for opening its four new clinics. This enabled Freed to test and refine specific processes outlined in the guidebook, including deliveries of supplies and medications, lab calibration and testing, courier services to and from the hospital, and even resources for linen cleaning and janitorial services.

Freed compiled details for the clinical opening guidebook and provided daily counsel to help guide the openings of the system's four new clinics. The goal was to provide the system with a turnkey resource it could apply to any future clinic openings.

Results

Within six months, Freed delivered a clinic opening guidebook divided into more than 900 categorized lines of responsibility, and provided direct counsel to guide the successful opening of the system's four new clinics. All four of the new clinics opened on-time and without any of the delays or resource hassles which had plagued the system's prior clinic opening.

Freed's work revealed considerable new information previously unknown or known only by individuals working in departmental silos. The health care system now has a robust tool to perform real-time tracking of its clinic opening projects, from end to end – providing visibility and transparency of the project status to all key stakeholders. This work also revealed the criticality of pre-planning for all contingencies needed for a clinic opening.

The system's new clinic opening guidebook was purposely built as a "living" document, reflecting the fact that it will continually be updated as the system's needs, interests and processes change. A system employee now ensures that this guidebook remains updated and relevant.

Freed's involvement helped the system save considerable time and resources as it opened four new clinics. Going forward, the clinic opening guidebook will serve as an invaluable resource to the system to help guide future clinic openings. It will also demonstrate reliability and confidence to internal and external partners that the system has a strong sense of operational direction and documented best-practice principles to guide it.