NATIONAL
RURAL HEALTH
RESOURCE CENTER

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Vendor Issues Management Or:

"I'm Right, and Here's Why!"

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Purpose

The National Rural Health Resource Center is a nonprofit organization dedicated to sustaining and improving health care in rural communities. As the nation's leading technical assistance and knowledge center in rural health, The Center focuses on five core areas:

- Performance Improvement
- Health Information Technology
- Recruitment & Retention
- Community Health Assessments
- Networking

Introduction

- Vendor issues management is about getting <u>your</u> issues resolved in a <u>timely</u> manner
- Need to consider the perspective of the vendor
- This presentation will:
  - Consider the perspectives of healthcare providers and IT vendors, contrasting their differences
  - Discuss some techniques that you can use to track your issues, escalate them, and what to look out for

Remember: The vendor is your <u>partner</u>!

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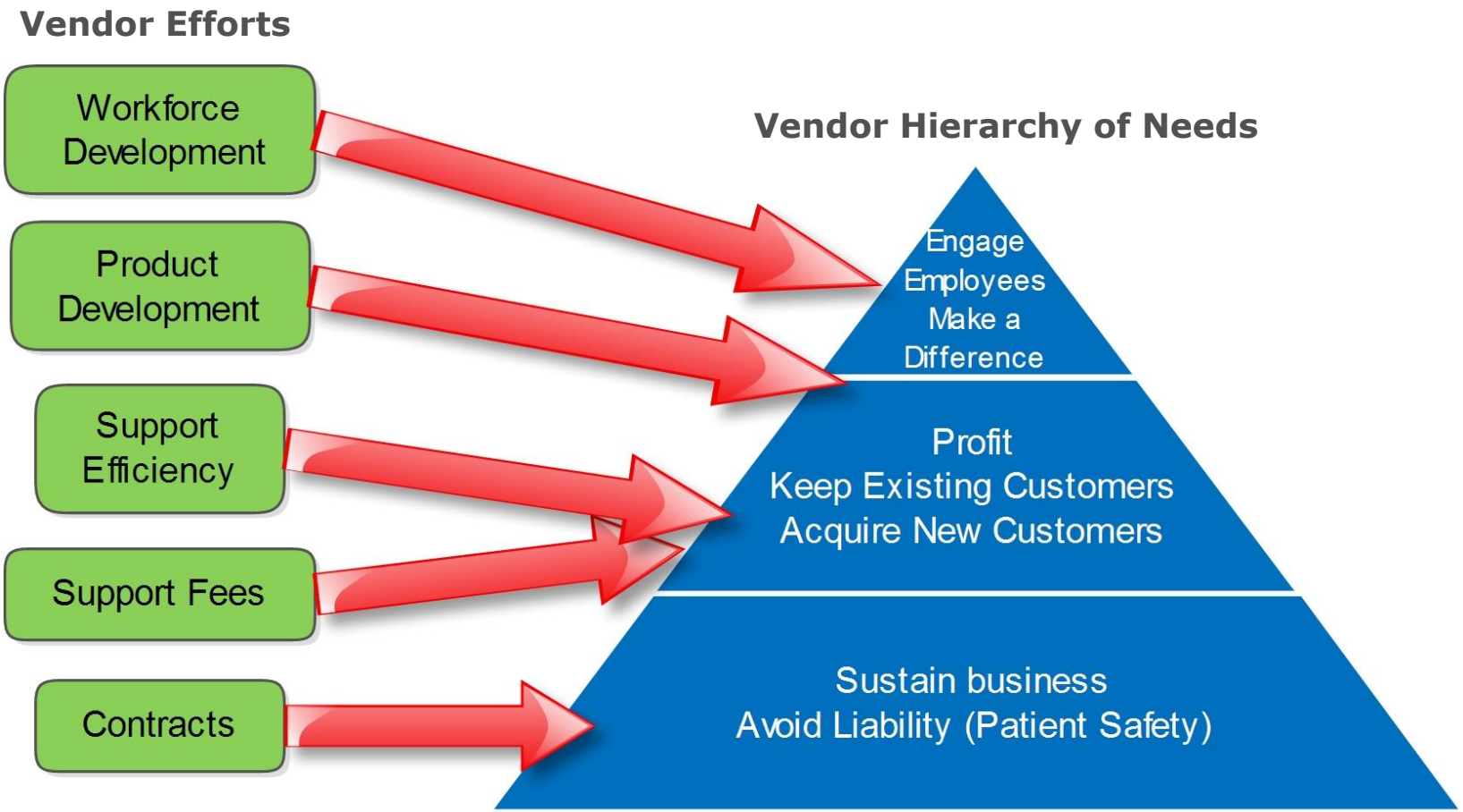
Points of View: Vendor



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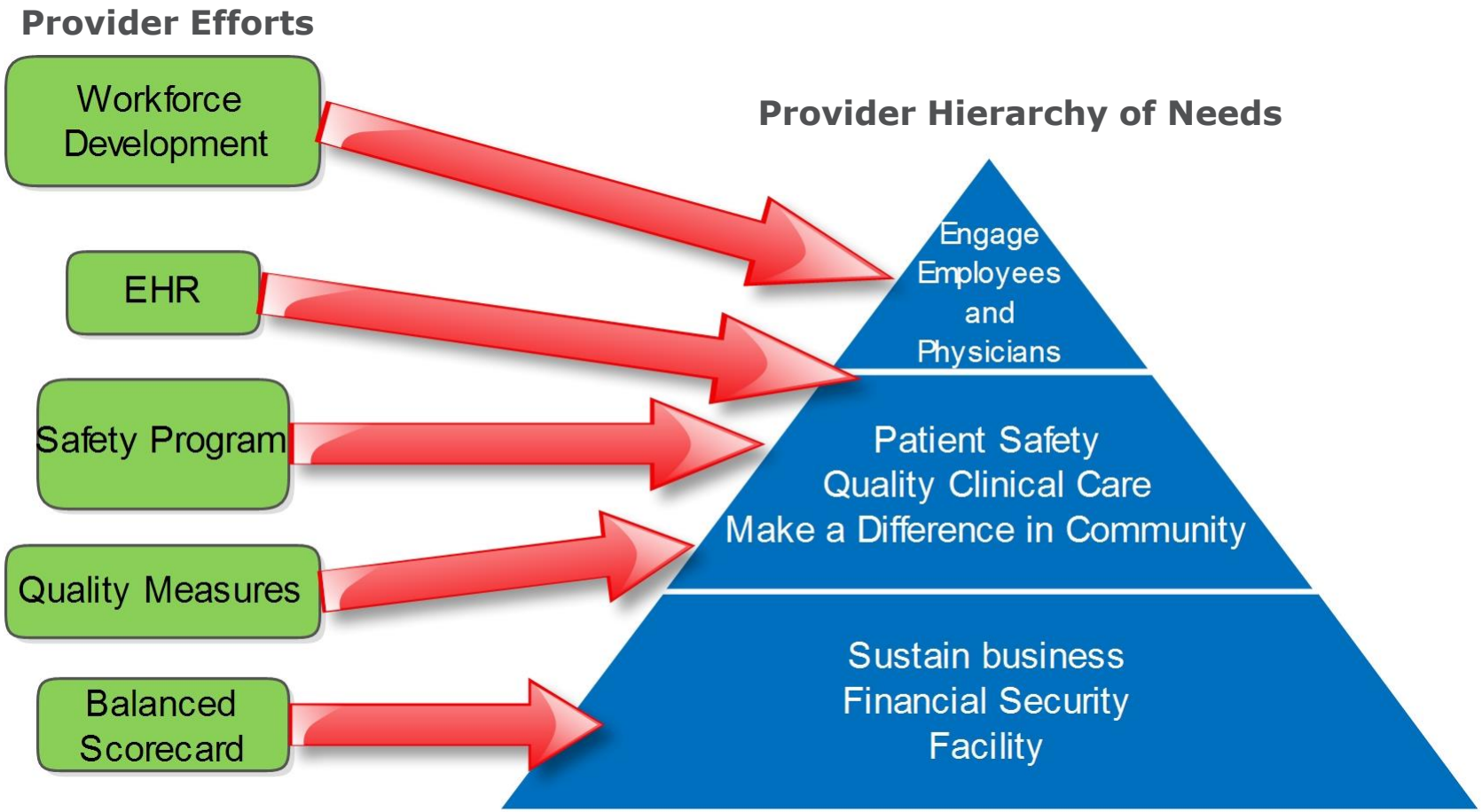
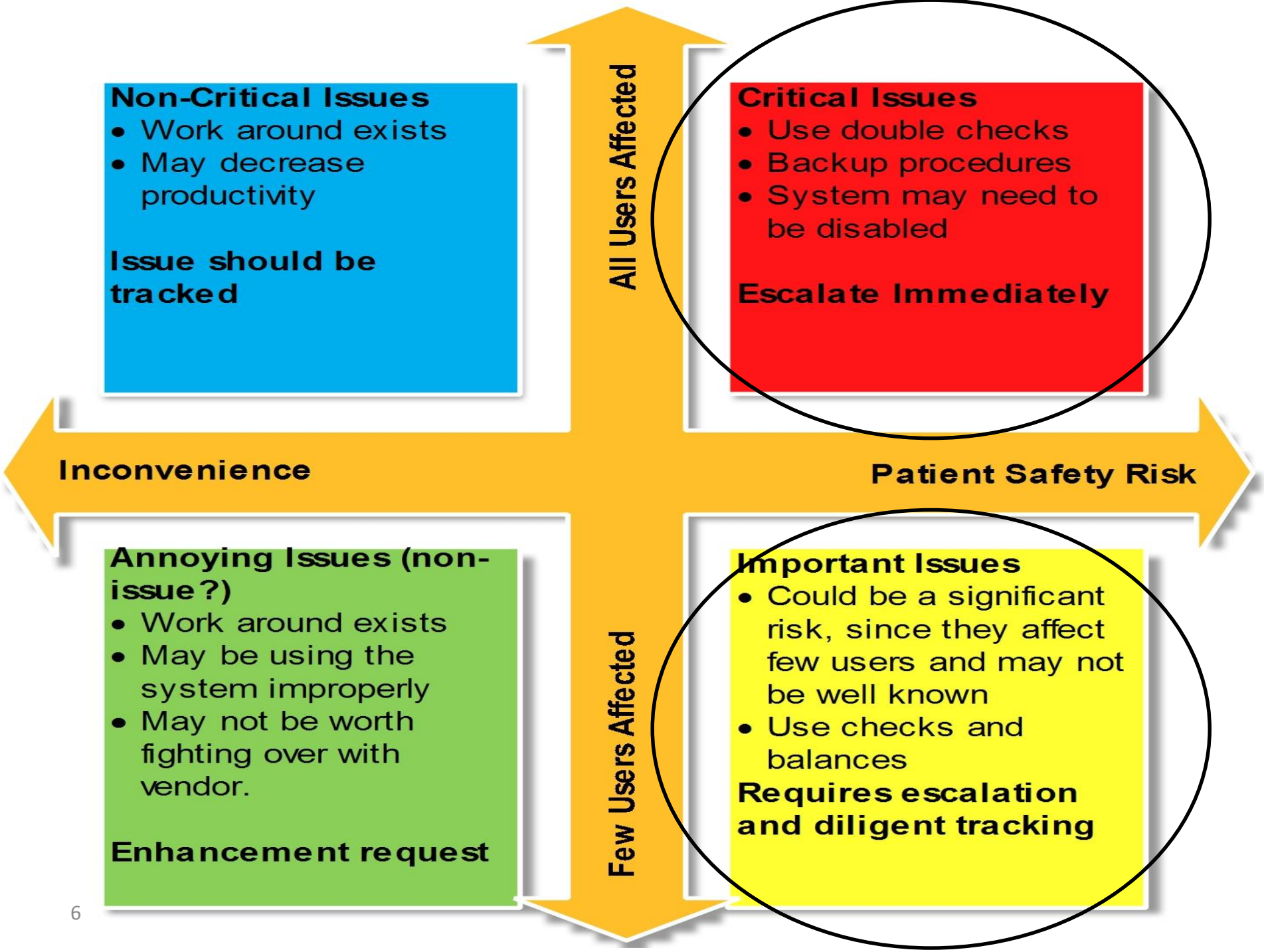
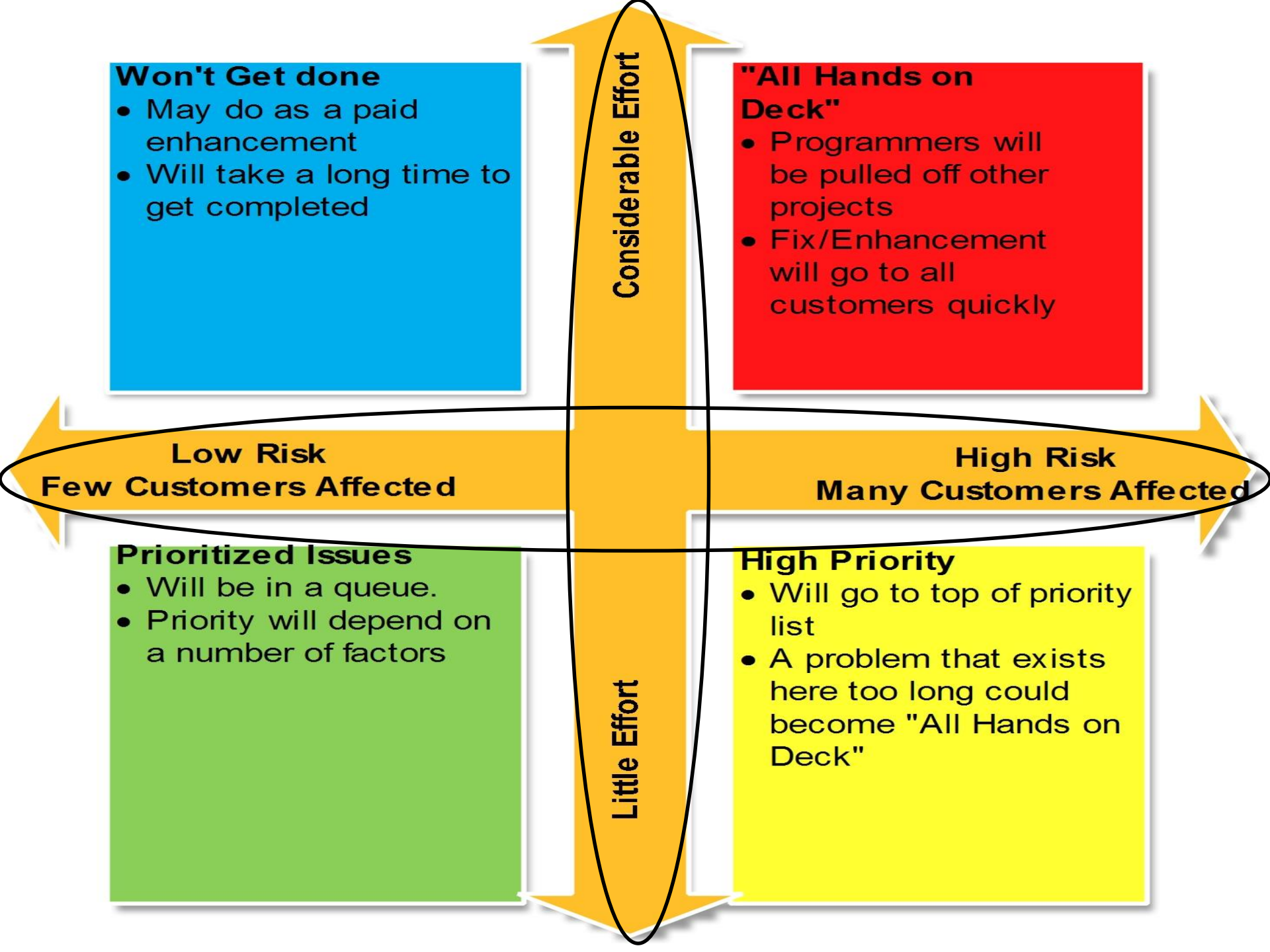
Points of View: Healthcare Provider




Non-Critical Issues
• Work around exists
• May decrease productivity
Issue should be tracked
All Users Affected
Critical Issues
• Use double checks
• Backup procedures
• System may need to be disabled
Escalate Immediately
Inconvenience
Patient Safety Risk
Annoying Issues (non-issue?)
• Work around exists
• May be using the system improperly
• May not be worth fighting over with vendor.
Enhancement request
Few Users Affected
Important Issues
• Could be a significant risk, since they affect few users and may not be well known
• Use checks and balances
Requires escalation and diligent tracking


Considerable Effort
Little Effort
Low Risk
Few Customers Affected
High Risk
Many Customers Affected
Won't Get done
• May do as a paid enhancement
• Will take a long time to get completed
"All Hands on Deck"
• Programmers will be pulled off other projects
• Fix/Enhancement will go to all customers quickly
Prioritized Issues
• Will be in a queue.
• Priority will depend on a number of factors
High Priority
• Will go to top of priority list
• A problem that exists here too long could become "All Hands on Deck"

Examples of Issues (and non-issues)

- Serious Issues
  - Patient Safety: Missed orders
  - Reliability: Frequent outages due to software flaws
- Non-Critical (Minor) Issues
  - Productivity Wasters: Slow screen changes
  - "Look and Feel": These may help with physician and staff engagement, but are not critical
- Non-Issues (at least for support)
  - Reliability due to your inaction
  - Problems due to PC issues
  - Issues that arise due to overlaying a poor workflow onto the EHR

Techniques and Methods

- The "issues list" – Pre- and Post-Go-Live
  - Used to keep track of issues
  - Needs to be shared with the vendor, even updated by the vendor
  - Should have a number of variables (see Small Hospital HIT Toolkit and example to follow)
- Collaborative efforts
  - Can be very powerful for issues that the vendor is not resolving fast enough
  - Peers & Neighbors
  - Consider teaming up with a larger facility

Techniques and Methods

- User group meetings
  - Can be a good forum
  - Bring your issues up in the proper context
  - Seek out collaboration too

Issues List

- Should have the following fields:
  - Vendor reference number
  - Detailed description with room for follow up
  - An assessment of risk or priority for each issue
  - Who reported the problem
  - What module is affected
  - What users are affected
  - Who the issue is assigned to, either the vendor of internal staff

Issues List

- Should have the following fields:
  - When the issue was assigned and the date of follow up
  - An indicator of whether the problem is escalated and to whom
  - Resolution and resolution date
- Issues need to have resolutions that are agreeable to the CUSTOMER
- Learn to use your vendors tools!

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Issues List

#	Description	Risk: H-M-L	Reported by	Date Reported	Assigned to	Date Assigned	Date of Follow up	Escalation	Resolution	Date Resolved	Signoff

Using the Issues List

- Pre Go-Live
- Post Go-Live
  - Should be a part of how you manage your IT systems
  - If list gets too large, or high-priority items are not being resolved in a timely manner, it is time to have periodic meetings with the vendor
    - Weekly status meetings
    - Engage account manager
    - Ask for an assigned project manager or developer

Collaboration

- If you are not getting issues resolved in a timely manner, collaborating with a peer can be very powerful
- Issues list is still in use, but there may be a shared issues list
- Get to know the hospitals or clinics that use your system, particularly those that are similar to you
  - Same level of adoption
  - Similar size and service offerings
  - Geography not important

Collaboration

- Have periodic calls (weekly?) with peer-partners and with the vendor
- This technique should only be used when there are critical issues that need resolution OR when your peer group has an enhancement request that you feel is important and would be a good contribution to the product

User Group Meetings

- User group meetings are an excellent forum to:
  - Network with peers
  - Discuss issues with the vendor and peers
  - "Bend the ear" of the vendor executives
- Be careful not to sound like a chronic complainer: Issues brought up in a public forum should be well articulated and have a significant impact on your organization

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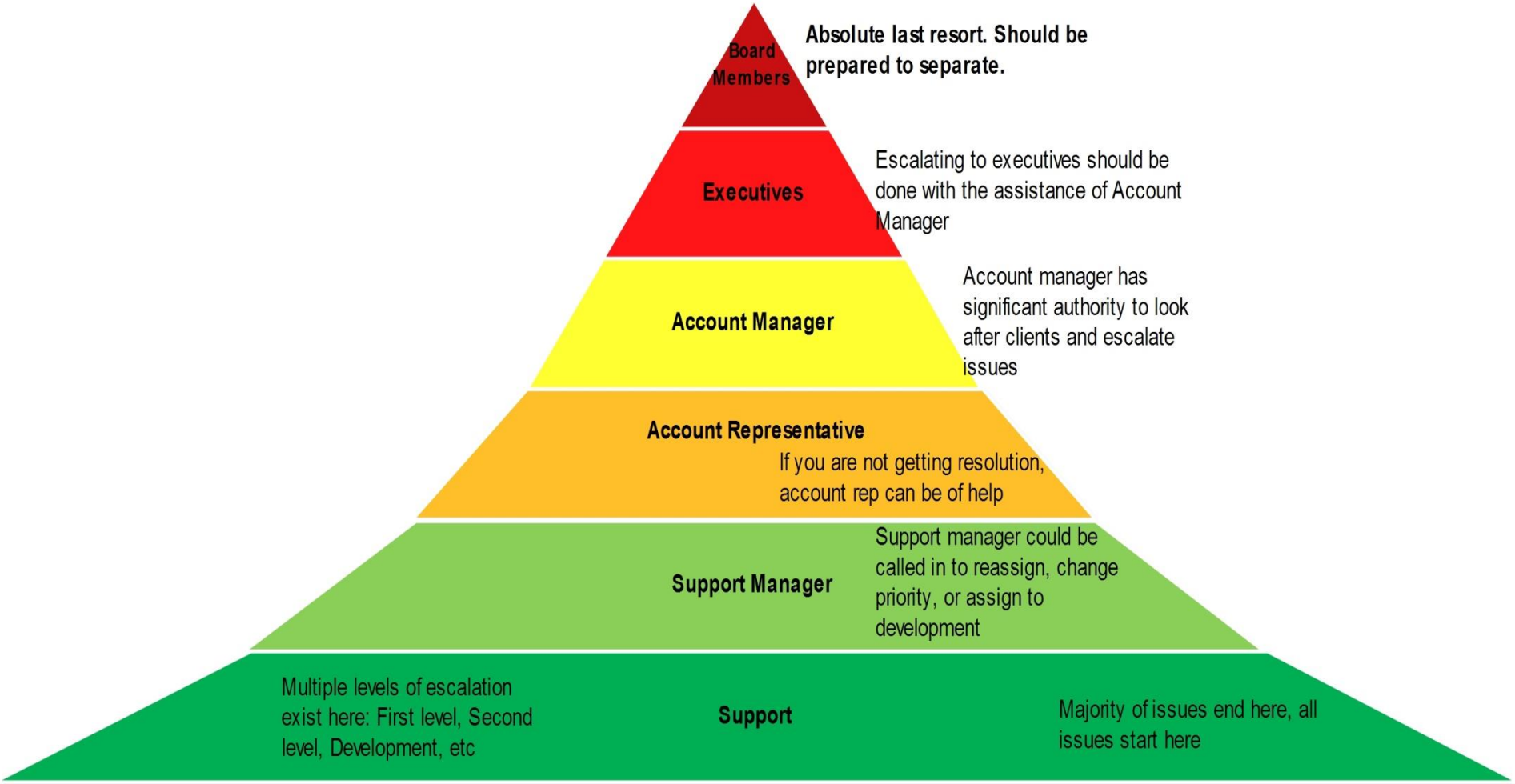
Escalation



Escalation

- Know your vendor's path!
  - Account manager may be happy to share this with you
  - Study the vendor's website, particularly the "About Us" page and "Executive Contacts"
  - Try to get a copy of the organization chart
- Be mindful of "stepping on toes"
- As you escalate higher, you will need to get more specific and have more evidence
- Understand your contract! There are likely response times, remedies for disputes, etc.

Leverage

- You have leverage when you have something the vendor needs:
  - Money
  - Recommendations
  - A happy customer
  - A quiet customer
- You create leverage by
  - Withholding payment for support (within the confines of the contract)
  - Talking with peers
  - Escalating issues

Leverage

- Use leverage wisely
  - Don’t make idle threats
  - Understand the vendor’s priorities and motivations
  - Remember: The vendor is your partner. Don’t burn bridges!

Being the "Squeaky Wheel" while not "Crying Wolf"

- The importance of timing
- Don't escalate unnecessarily
  - Ask why your issue has not been resolved
  - Ask for escalation and resolution dates
  - Ask (don't threaten) to escalate
- If resolution time is becoming a chronic problem, request weekly status meetings with support manager or account manager

Being the "Squeaky Wheel" while not "Crying Wolf"

- Escalation should not be a routine procedure. If it is, you are either "crying wolf" or the vendor is not performing…
- Ask your peers if they are experiencing the same issues

Making the decision to divorce…

- Red flags that may indicate the vendor is in trouble
  - Shortage of staff, yet few job openings on their web site
  - High turnover in sales staff
  - Critical issues are not being resolved and your peers are also very frustrated
- Be aware that:
  - Switching vendors is very expensive
  - There is a contract, and you and the vendor will need to live up to it
  - You will need to get your data out of the system
  - Once the vendor believes they have lost you as a customer, they will provide minimal support

Making the decision to divorce…

- Understand your contract!
  - How do you separate? What is the term of the contract? Did you and the vendor follow all procedures defined in the contract?
  - What does the contract specify for data migration?
  - Is it possible to have a read-only system for a period of time?
  - Remember that you probably don't OWN the software. You have a "right to use".

Summary and Additional Tips

- Keep in mind the point of view of the vendor
- Do your homework!
  - Contract
  - Check vendor website for executive contacts, job openings, other information
- Keep an issues list, both before go-live and after.
- Learn and use the vendor's tools

Summary and Additional Tips

- Know how to escalate
- Know your leverage points
- "You can attract more flies with honey than vinegar"
  - "I would really like to be a reference account?"
  - "Should this issue be escalated?"
  - "Where is my issue in your priority list?"
  - "What is the best way to escalate issues that I feel are important?"

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