

# Implementing the CPR: A Journey

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by Art Frohwerk

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*Implementing a CPR system is a major change for any organization. The author offers an approach to managing this change, including critical factors, characteristics of winning solutions, and the highlights of this journey.*

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Many think of a CPR as merely a software and hardware "product." But it's more than that. A CPR is actually one of the most value-enabling tools yet in healthcare -- an "integrating solution." The effect of installing an integrating solution like a CPR has seven important steps, compared to a possible three or four basic elements in implementing a typical product. Building a CPR will link people, transform departmental functions, and coordinate the need and use of information seamlessly to help an organization better care for the patient. This can cause a positive cultural change in an organization with otherwise routine and overloaded processes.

Implementing a CPR is very much like a major operation; the intensity of pain, time to recover, and successful outcome are dependent on the awareness, fitness, and effectiveness of the total process experience. Here we will describe the real nature of the challenge in implementing any major integrating technology or change and how it can be done best -- dealing with all the critical factors. We will clarify the characteristics of a process-focused "integrated solution," and outline the highlights of what I like to call the "heroic journey" of implementation.

With this approach, you will accomplish more than just installing a CPR. You will discover better ways to do the business of patient care.

## The Challenges

Here are some of the challenges we face:

1. Complexity has increased. Managed care is affecting reimbursement; rules of compliance are changeable and complex; patients know and expect more.
2. The external rate of change is enormous in a business known for stability.
3. Silos of expertise in healthcare have created barriers; we need to become more collaborative and cooperative.
4. The mindset of quick-fix "products" is incompatible with the planning and front-end patience needed for real solutions.
5. Vendors have a propensity to sell and deliver their proprietary part, get paid, and get out, which leaves the user with the potential for disconnects.

The healthcare industry is following a similar pattern of difficulties and failures that the manufacturing industry experienced in the 1970s and 1980s installing materials resource planning (MRP) -- or recently enterprise resource planning (ERP) -- systems to manage their resources, information, and integration of enterprise functions. These problems included:

- installations took years instead of months -- or people gave up
- ROI was missed

- customers were at risk
- many features were not used
- buy-in never happened in many departments
- jobs were lost and confusion grew

Of course, healthcare is different than manufacturing and other service industries. But it, too, is a process with highly interdependent functions, impacted by diverse rules and regulations, demanding areas of specialization, and driven toward efficiency in order to deliver competitive quality to increasingly demanding customers -- a business!

In recent years, system implementation in diverse and rigorous industries -- food manufacturing, pharmaceuticals, theme parks, transportation, laboratories, blood centers, and hospitals -- has demonstrated a pattern of best practices. This pattern of introducing major integrating "solutions" like a CPR into an existing operation has been practiced and proven. This pattern, sometimes called "breakthrough implementation" due to its magnitude of change and effect on improvement, can almost guarantee exceptional results quickly. It demands one important paradigm shift: Instead of buying "a product," buy into and prepare for a change in the total process and the opportunity for delivering a new level of value. This paradigm will give us energy to discover possibilities that deliver results never imagined and make it dramatically easier to do a good job.

### Three Critical Terms

These terms are important because their implications cause shortcuts in our behaviors:

**Solution** -- a measurably positive impact on the needs and objectives of a necessary set of people (i.e., customers and other individuals who will influence the success of the result) without creating unanticipated new problems.

**Product** -- a tangible unit that delivers what a specific customer has requested.

**Service** -- a measurable effort that delivers what a specific customer has expected.

When we recruit a new employee, we often want a service to help us find or preselect a person. When our copy machine jams, we call for service help to get it back into operation. We usually hire consultants to provide facilitation, advice, and skills as temporary help. In each case we define expectations, refine them with the provider, and measure their effect in various ways. We can tell when and how well the expectations are met. The expectations are usually an assistance, or help, to other activities we must do.

Purchasing a desktop computer product for a new employee is based on specification of needs -- features, cost, size. Buying copy paper is based on known requirements. The bookstore sells an array of products that we can look at, try, and choose to take home. Products can be defined within a space, and they tend to affect our lives in ways described by functions and features.

In the case of both products and services, we often have to learn a little to be an effective buyer. Quickly, we can see the product or service, then get it and use it. It satisfies our known needs. And the change it induces affects a limited set of people or affects people in a limited way.

Let's look at a solution. Once we recognize it, we will be more prepared to demand it or deliver it when it is needed.

Imagine a typical example: We need to remodel the building we work in -- a problem that needs a solution. We need to understand the objectives and constraints of our business. We must define our basic functional needs, how the solution will be arranged, and how it will flow. We must ensure that it will relate to our patients and other customers, including what everything will cost, how to coordinate all the activities in the right order and with whom, where to buy what, etc. Some of these things are not a usual part of our skills or experience, or they do not fit with the routine demands of our present job. Because of this we will, in fact, not always know what we don't know. We need a solution. A solution will be a group of services and products that help us meet our known and presently unknown needs and objectives in a way that works well for all involved or affected -- with minimal surprises.

## Buying a Solution

A CPR must be a part of a solution if it is to have the desired effect on users, their business, and the patient. We cannot afford to waste our capital. The time and energy of our staff is limited and invaluable. We must improve our ability to optimize patient outcomes for the best cost/value. We must strengthen our use of knowledge and its ability to strengthen relationships with physicians and in educating the community. A CPR can enable many people to interact, see, and accomplish things they do not yet totally appreciate. Once a solution is in place, it will have redefined the quality and processes of how they can work.

Our approach is based on learning from mistakes, watching the effect of shortcuts, and then trying the alternate approach defined here. Generally speaking, there are usually seven components of a solution. Addressing each of these optimizes the chances of getting the desired results and consistently takes less time and money.

Addressing these is indeed a "heroic journey." Most implementations address fewer than 50 percent of these issues in their first pass. Yet in any industry, when the full pattern is followed, the change can happen 20 to 60 percent more quickly and cheaply and with a better result. Perhaps we should call it the "smart journey."

## Steps on the Journey

*1. Know all the critical needs and people with influence and account for them proactively to build alignment.*

Three key issues are involved here:

- Understand the issues and trends of change (and opportunity) that will drive the scope of implementation
- Recognize all the people who will have an opinion, can help or hinder buy-in along the way, or will use the result
- Proactively address how these people and issues are realistically included -- at the right place, in the right way, at the right time

The factors and trends fit into eight categories. They include several external issues that can have a dramatic effect on the specific business or on an entire market:

- Market and economic -- the business characteristics, needs, and financial status of the direct and support participants
- Business -- the internal decisions, plans, and capability of the total operation and its partner relationships
- Government and regulation -- the drivers of standards, politics, and compliance
- Technology -- the tools resulting from applied science, such as computers, peripherals, communication devices, networks, languages, forms, identification, and tracking
- Competition -- Companies or forces that do, or can, take demand away from your business
- Education -- the knowledge, skills, and attributes of the people needed for the viability of the business -- as customers, employees, or opinion makers
- Demographics -- the human characteristics of the market population -- age, job, home, marital status, social history, children
- Culture -- the behaved beliefs of people and how they will affect seeing, planning, and performance

Being aware, understanding, and accounting for these factors reduces surprises and assures pertinence to the solution.

Failing to recognize all the people who will influence the decisions and user processes is probably the most common mistake in every attempt to deliver a solution. Those who are not included will have a more difficult time supporting decisions and using

the final solution; they may misunderstand the context or the appropriate details. In all cases, their fears and concerns can delay or derail progress.

A lack of engaged support may be the difference between success and failure. Usually there are numerous influencers: customers, employees, management, investors, managed care, industry groups, community groups, or suppliers.

Proactively accounting for the driving factors and influencing people will save time and risk and enable a more positive energy of involvement. This is also the best way to begin alignment -- the first step of the "heroic journey."

*Lesson:* A CPR can be a dramatic advantage to all of the above drivers. Rarely is its full capability planned to take advantage of its potential as a competitive tool, an aid to compliance, streamlining for billing, or a chance to instill a much more collaborative and timely focus on quality for the patient.

## *2. Understand the direction, objectives, and values of the business to be pertinent to the business strategy.*

A business can be described by its vision, mission, values, and the products and services it chooses to offer. These establish a set of business objectives that should drive the business plans of the total company, of each department, and every project implementation team. A CPR will have a dramatic effect on the resources and the capability of the operation for its customers. Connecting with the direction of the business, and possibly helping to affect the redirection of the business through improved access, collaboration, or knowledge is a major opportunity.

*Lesson:* When CPRs are sold within a few departmental groups, leaders miss the alignment and support of the executive-level strategy team, as well as champions from key groups like physicians and nurses.

## *3. Make sure the core processes are efficient and ready for change.*

### **Figure 1: HIM before a CPR**

Everything is accomplished by a process. Efficiency is the ability of the process to perform with the least effort, cost, and time. Effectiveness is the ability of the process to meet its intended objectives. Most processes were designed or evolved based on a manual (paper) paradigm. The capability of a CPR offers a dramatic change for more people to do more things better in less time. But the efficiencies, effectiveness, and users of a CPR-operated process are different than a manual process. Figures 1 and 2 show an example of the "before" and "after" of a process affected by "designing in" a CPR.

Understanding and ownership of the new process are critical. Imagine trying to run the business the "old way" when you have installed a CPR that requires and allows for a "new way."

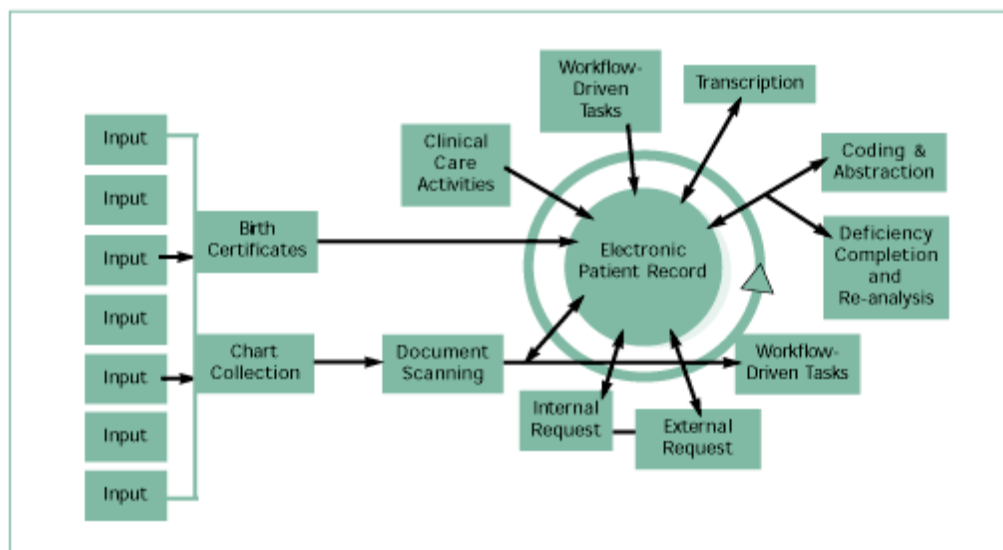
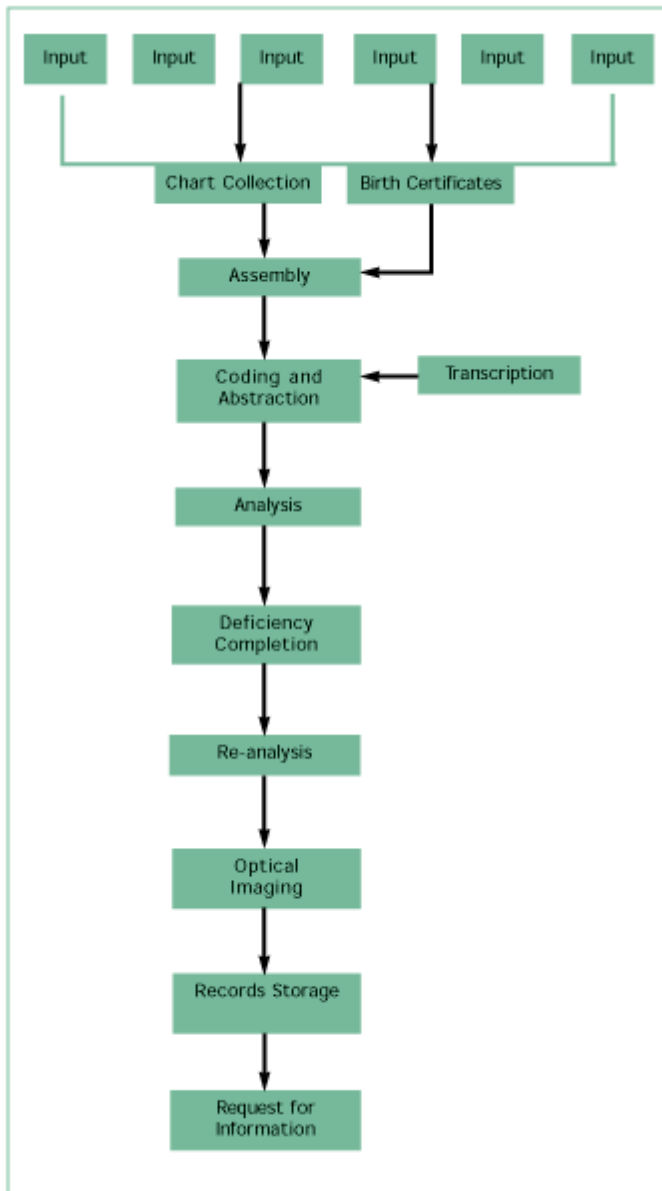
*Lesson:* Most process redesign is done at a micro (departmental) level. Rarely is an "integrating picture" with an identification of the effects on all the "influencers" assembled. This limits shared internalizing of the new way of doing business. It also misses key factors and opportunities of connecting things in a new way.

## *4. Build the skills, supplement the resources, and introduce the need for new relationships in the preparation of the organization.*

An organization exists to organize people in relationships with the right skills and roles to run processes that meet business objectives. A CPR dramatically changes the processes. It therefore requires the redefinition of roles and relationships. New skills need to be developed and reinforced to overcome habits from the past. The things that enabled past successes will not all be the same for the future with a CPR. Yet the level of human value will be increased everywhere in the process.

Teamwork is an inherent component in integrating technology -- training will be needed to make the integration a more shared behavior. The installation and expansion of the CPR capability will require project management expertise that may be a bit rusty. Logistics of people and the progressive transition away from paperwork will cause change. The tools themselves will be more computer-focused, and communications and access will be expanded, quicker, and more robust.

*Lesson:* Accessibility of information and the chance for easy collaboration are among the greatest opportunities resulting from the installation of a CPR. Legacy systems often need to be updated or replaced to get the full potential of this accessibility.

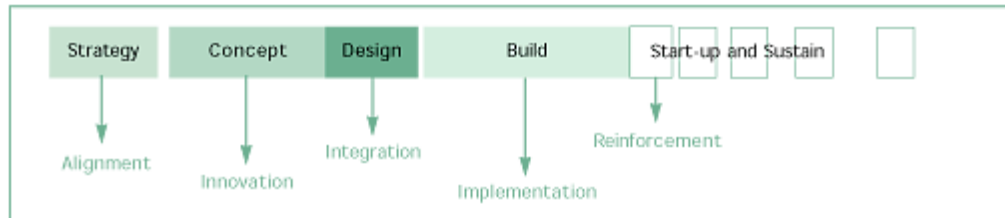
**Figure 2: HIM after a CPR**

5. Plan the interfaces and upgrades that will relate to the existing systems of standards, forms, technology, etc., to reduce disconnects and disappointments.

Systems help people run processes to meet objectives efficiently. Forms, standards, templates, computers, peripherals, and phones will need to be rethought, coordinated, and simplified when using a CPR. Planning many of the changes ahead will help in visualizing the new process of using a CPR.

*Lesson:* Achieving a common nomenclature has been one of the biggest last-minute problems in instituting a CPR. The "alignment" (see "The Heroic Journey") is critical to reaching consensus.

**Figure 3: The "Heroic Journey"**



**Alignment:** Commitment to new approach; establish "dimensions" of success; discover "biggies" and "quick hits"; team all influencers and align by attitude; proactive push-back; set up climate for innovation; establish integration strategies (process structure, people flow and transactions, information and automation, logistics and communications, facilities and operations); uncover metrics

**Innovation:** Maximize innovative options in every "dimension"; build early estimate (scope, cost, time, benefit); set validation master plan and configuration management; conduct value planning; plan win-win for every influencer; assess life cycle for constructability, operability, maintainability; set budget and trending commit to price

**Integration:** Integrate teams and tools for knowledge-based implementation; coach plans and trends; maintain focus but adapt; measure success; maximize value

**Implementation:** Minimize change; pursue every issue; build new attitudes through involvement and recognition; verify "dimensions"; manage rolling punchlist

**Reinforcement:** Complete operations readiness; establish efficient operation; confirm completed punchlist; survey influencers; sustain success

6. Address the beliefs of an individual's need for security, importance, self-confidence, and opportunity to empower a supportive culture.

Culture is the great enabler. It will allow your team to see the issues clearly (or not) and cause them to change and adapt easily (or not). Most people are already busy, tired, worried, and sometimes confused. A CPR should be seen as a "solution" that will make efforts and personal skills more valuable, not just one more half-baked initiative full of new problems.

Include people in the right way and at the right time. Listen with empathy and demonstrate commitment to stated values openly and honestly. These are some of the components to optimizing the organization's most important asset -- its people.

*Lesson:* Emotional energy is tough to measure but easy to see. It is the best indicator of future success through commitment, fresh ideas, teamwork, and growth of the organization.

7. Establish new operational measures, reports, and reinforcement needed to assure ongoing efficiency and effectiveness.

Desired new habits require consistent reinforcement (at all levels) to assure new behaviors. This can take the form of communications by supervisors or colleagues, distribution of trend reports that show progress and shared targets, and recognition of the realism of some ups and downs. Celebrate milestones that are measured against the shared objectives.

New behaviors that result from the process will require new measures. Some will be especially useful during the transition. Others will be needed once the change is fully in place.

*Lesson:* Old measures often cause confusion and imbalance in the new process, causing people to want to revert back to the "old way." Look more at the overall team and process for best impact and benefit.

## The Journey

A "solution" is the "what" in implementing a CPR. The "journey" is the "how." We have an approach to changing the processes and the roles and relationships of people. This enables us to better manage the delivery and quality of healthcare. Here we will outline the highlights of the best practices journey.

The journey has five stages. Their order is critical. Each stage must continue well into the following ones. They use practical principles of psychology and project leadership:

1. Alignment -- the ability to move a diverse set of people from high-level issues and principles through a process of sharing a common idea of how they can use new processes and tools to achieve important needs and objectives
2. Innovation -- using the creative energy in every person to contribute to what, how, when, who, and where things can be done
3. Integration -- planning to fit existing or creating new paradigms for how processes, people, systems, and metrics can work in harmony
4. Implementation -- the rigorous design, build, and testing of the plans to make them work efficiently and effectively
5. Reinforcement -- continuously measuring, communicating, improving, and celebrating what you have -- to keep on track with objectives

These five stages require a thoughtful and diverse leadership team. Their commitment and continuity are needed to deliver an integrating solution. The solution is more than hardware and software. A well-managed journey, taken as a solution, will uncover processes that are simplified and sensible. It will define roles that better use the value of each person. It will build tools that work and outcomes that are measurably the best.

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## Seven Steps to a Solution

1. Deal with the critical needs and influencing people. Know all the critical needs and people with influence and account for them proactively to build alignment.
2. Account for objectives and directions of business. Understand the direction, objectives, and values of the business to be pertinent to the business strategy.
3. Facilitate the core process. Make sure the core processes are efficient and ready for change.
4. Adapt the roles, skills, and relationships. Build the skills, supplement the resources, and introduce the need for new relationships in the preparation of the organization.
5. Integrate with all the systems. Plan the interfaces and upgrades that will relate to the existing systems of standards, forms, technology, etc., to reduce disconnects and disappointments.

6. Strengthen cultural beliefs and behaviors. Address the beliefs of an individual's need for security, importance, self-confidence, and the opportunity to empower a supportive culture.
7. Provide measurable results for ongoing improvement. Establish new operational measures, reports, and reinforcement needed to assure ongoing efficiency and effectiveness.

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