CORRECTING
A MISSION CRITICAL
SYSTEM UPGRADE

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In 2016, a national non-profit healthcare consulting firm implemented a new population health management software system to track and manage patient claims and physician-patient interactions for their clients. The organization had contracts with state agencies across the country supporting over 15,000 providers. While the system was capable of providing the required services, its original implementation had caused continuing problems for users. The initial implementation had not been planned or managed well, there was insufficient training, aspects of the software didn't fit staff needs, and several of the organization's healthcare clients complained about the system – some going so far as to issue corrective action plans. After the implementation, they spent two stressful years fixing problems with the original roll out.

At the same time, the software vendor released new versions with enhancements, but because the organization hadn't properly implemented the software, it was swamped fixing problems, so they were unable to implement upgrades. An organization that makes shortcuts during an implementation incurs future liability that will result in a cost to the organization, which is known as technical debt. From 2016-2018, they were under considerable stress as they focused on "paying" down the debt.

In 2018, they turned their attention to upgrading the software and correcting the workflow problems by the end of the year. But by the end of 2019, they were nowhere near a go-live date. Signs of project failure were readily apparent, from friction between leadership and stakeholders, to not having an approved budget; from issues between stakeholders and the software vendor to a lack of an approved schedule through go-live. Leadership wanted the upgrade project completed as soon as possible, but stakeholders had turned the upgrades into a full-blown implementation project with detailed requirements, which was another example of how deep they were in technical debt.

Due to Brightwork's previous experience in the healthcare industry and our background leading major system implementation and upgrade projects, we were hired to guide the project back on track. We collaborated with leadership, stakeholders, and the software vendor to discern why the original implementation had gone awry and why upgrades were not being executed. We collaborated with the vendor to develop a joint project plan and a detailed budget inclusive of internal costs through go-live. We worked with the vendor to restore the relationship and establish regular steering committee meetings. We teamed with C-suite level and Senior VP level leadership to increase cost and timeline transparency, provide context for the accrued technical debt, and to establish annual upgrade process to avoid this situation in the future.

Within 10 months, the project was finally on track with a realistic budget approved by the CEO and CFO, a reasonable project timeline, and a restored relationship with the software vendor. Brightwork's project manager was able to hand off the initiative to internal resources with detailed project documentation. With a successful handoff, it was our technical expertise, experience with major program implementations, and focus on team-building that ultimately helped the organization move forward successfully on their own steam.

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