



## Use Cases For Technology Change Management



### Heart to Heart Hospice

#### Company Description

Established in Plano, Texas, in 2003, Heart to Heart Hospice provides end-of-life medical and support services for patients and their family members. It has grown into one of the largest private providers of hospice care in the United States with **more than 4,000 patients** receiving daily supervision.

#### Examples Where CM Has Been Used



Implementing new technology



EMR changes



M&A activities



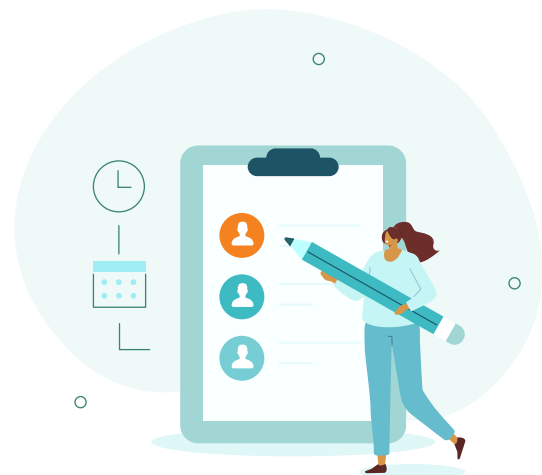
New products or major updates added to existing technology

#### Their Approach

Heart to Heart Hospice believes in a CM process that involves its staff early and often. While leadership monitors operations and identifies potential gaps that technology can address, no official action is taken until a cross section of key users is consulted. Once a need is verified by clinicians and staff, or new information is provided for consideration, leadership moves forward with the appropriate decisions.

“We do polls and emails to determine, ‘Is this something that you could see as beneficial?’” says Patrick McPherson, Sr. VP of EMR Operations. “We really talk about it. We’ll have touch-base calls to discuss whether there really is a problem that needs to be fixed, and if so, how the new technology could function and what it could look like.”

With employee feedback in hand, leadership lays out its objectives in detail with potential or existing ven-





dors. As the process moves toward implementation, objectives evolve into a tactical plan and the communications focus back on the staff and its goals. McPherson says Heart to Heart expects its vendor partners to assist the implementation team in creating flyers, documents, and helpful guides to prepare the organization for change.

As steps are completed for the final rollout, any new concerns get funneled up to leadership once more, McPherson says. This cyclical movement between the organization's decision-makers and staff helps ensure the kind of alignment needed for success.

"I really think that when you make things as easy and accessible as possible for users, adoption is easy," McPherson says.

## What Practices They Stress

Heart to Heart has made a conscious effort to improve its technology CM practices, starting with project planning and the creation of teams to lead the organization forward. Shane Vrana, Director of IT Applications and Infrastructure, likens the company's advances in this area to its progress with technology itself.

"We were literally still on paper when I started in 2012," Vrana says. "There really wasn't a clear plan for [CM] at that time. Now we set much clearer paths toward our goals."

McPherson believes the organization also communicates well throughout the change process. He says transparency is critical at all stages, even when it involves an unforeseen circumstance or setback. This extends to post-implementation evaluations and employee feedback as well, he adds. As a primary function of his position, McPherson oversees the removal of barriers for clinicians and staff, making things easier and creating a more pleasant workplace through technological solutions.

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**PATRICK MCPHERSON**  
Sr. VP of EMR Operations

