



- ROBERT GENEST -

## Collaboration: The Rx for Successful IT Integration

Robert Genest is the President of Business Innovation Canada Corp. in Montreal.

**P**ick up a magazine, listen to the radio, read a newspaper, or watch the news and you'll be inundated with stories focusing on our country's healthcare issues. And, while most of us tend to get basic services when we need them, I think many of us would agree that better communications and more streamlined processes could yield significant improvements in overall healthcare services rendered.

In the healthcare field, whether it be directly related to delivery systems (hospitals and doctors) or pharmaceutical services, successful IT integration initiatives can lead not only to better healthcare services - by enabling more informed decision making and maximizing the effectiveness of human and technology assets - they can also mean the difference between life and death.

Unfortunately, if you've ever been part of a major IT integration initiative, you know all too well the challenges involved with bringing together diverse constituents to agree upon a common goal, a clearly defined set of deliverables and the selection of technologies to be used. You've seen projects fail due to poorly defined requirements, lack of executive sponsorship and user involvement, scope creep, lack of vision, poor project management, power struggles and hidden agendas.

These problems are highlighted in a study originally conducted by the Standish Group in 1995. The study found that more than 80% of IT projects were being delivered late or not at all - with 31% being outright cancelled. In 2003 the survey was updated and showed that 34% of IT projects were considered a success while 15% were considered failures, and 51% were considered challenged. And, of those projects finished, only 52% of planned functionality was delivered.

There is one common attribute often affiliated with IT projects that fail. It is a trait that may not be obvious to you or many others. It is lack of collaboration. Without collaboration, sharing of knowledge cannot be achieved - and people and systems cannot be properly aligned. Without collaboration, integration efforts will most likely fail.

Simply defined, collaboration is the ongoing agreement amongst chief stakeholders regarding the key elements of the initiative. Specifically, what are the general outcomes and return-on-investment expected and what are the people, processes and technologies used to achieve those objectives. The return-on-investment may relate to financial benefits but could also include less tangible goals such as "improved medical treatment through faster access to medical histories."

Achieving collaboration may sound simple. But, getting diverse constituencies with different individual agendas on the same track is very difficult - not to mention the logistical challenges of getting

everyone in the same room or at the same meeting simultaneously, or having updated information easily accessible on a continuous basis.

The good news is there are some examples of large-scale IT integration projects that succeeded - mainly due to proper project management and a strong commitment to collaboration. And there are tools and techniques that can be used to foster collaboration and ultimately ensure project success.

Canada Health Infoway's Electronic Health Record (EHR) initiative is an example of a well-managed, very large-scale integration initiative that embraced collaboration. The EHR initiative was primarily launched to foster and accelerate the development and adoption of compatible electronic health information systems across Canada. An EHR will provide individuals in Canada a secure and private lifetime record of their key health history and care within the healthcare system and is seen as critical to the successful integration of healthcare services.

One of the first steps in rolling out the electronic health record solution across Canada was the development of the technology Blueprint - a scalable business and technical architecture that is guiding the development of the electronic healthcare record. Consultations were held with 13 Canadian provinces and territories and 300 stakeholders including healthcare administrators and professionals, IT specialists and providers, technology companies, academics and a reference group made up of representatives nominated by Chief Information Officers from the provincial and territorial health ministries. "Interoperability is the cornerstone of what we are trying to do," says Dennis Giokas, Infoway's Chief Technology Officer.

Where did Infoway begin when tackling this massive project? The simple answer is that there was an early establishment of a culture within Infoway and the jurisdictions that collaboration was essential to getting the job done. Richard Alvarez, Infoway's President and CEO states, "At Infoway, we have established an agreed-upon collaborative strategy and work hard to involve all stakeholders - provider groups, vendor groups, physician groups and the technology companies."

Infoway used facilitated workshops to begin tackling its challenge. Workshops are highly interactive team-building sessions, often dividing larger groups of attendees into smaller focus groups to attack pieces of an issue. Workshops were a key part of Infoway's initial planning process and were key to helping the diverse stakeholders contribute to the development of a single, clear vision and the ultimate Blueprint. Workshops can be facilitated by internal professionals or outside firms. In either case the facilitators need to be perceived as neutral and objective by all stakeholders.

Workshops are intense and quick, typically lasting between a half-day and a week, depending on the size and complexity of the issue or the plan to be developed. Deliverables from these workshops typically include an outline of the business and technical challenges; business context and process diagrams, high level requirements; risk and issues; and most importantly action plans; with next steps, owners and deadlines. But, less tangible outcomes are even more important. The participants build a sense of teamwork and ownership as they work together. The most important outcome is often that participants begin to relate to each other's problems as people and develop more personal relationships beyond e-mail and conference calls. These relationships will go a long way in overcoming the inevitable bumps that will occur in a project.

Workshops can be significant time investments and add emphasis to the need for strong executive sponsorship. Someone with influence needs to highlight to stakeholders that collaboration is important and needs to be made a priority on their individual schedules.

Infoway has also deployed a secure intranet and extranet to create an environment that allows individuals at Infoway and the provinces and territories to work together to sort thru vast amounts of data and share ideas and information simultaneously to build the EHR.

The spirit of collaboration has continued beyond the Blueprint. Infoway assisted in bringing Alberta, Newfoundland and Labrador together to collaboratively define standards for a client registry system (designed to uniquely identify the patient being cared for). It is one of several components of an Electronic Health Record; others include provider registries, location registries, diagnostic imaging, drug information systems, etc. Infoway continues to engage all provinces via a "pan-Canadian table" that will meet periodically to validate and endorse the pan-Canadian standards that are needed for systems interoperability.

Although executive sponsorship is key, collaboration is not achieved through the use of a single tool or by enforcing a "thou shall collaborate" mandate from above. Changing from a "knowledge-hoarding" to a "knowledge-sharing" organization is the first step to achieving collaboration.

This shift does not happen over night. Take the time necessary to identify the problems and select the right solutions. It is best to phase collaboration tools and techniques into your environment while addressing organizational change management issues. And, although the "big bang" approach may eventually work, it will likely be costly - in terms dollars and human resources - and may create a negative stigma about the true value of collaboration. Begin by rewarding early adopters and highlighting successes to promote a culture shift. Gradually embrace the notion of workshops and other tools of collaboration to further improve your operations.

Collaboration is key to moving your healthcare organization away from the static, top-down planning mentality to a sharing environment where information flows in all directions, across all levels of the organization and to relevant external parties. It can also mean the difference between life and death.



***What best practices should you consider when tackling your own integration challenges? What steps/actions can you take to properly align, people, technology, teams and organizations to define a clear, common vision and a unified plan?***

Below are examples of some of the more common collaboration techniques used to manage integration projects. These are tools you may wish to consider using the next time you are involved in a major IT project.

**Facilitated Workshop:** A successful tool for starting initiatives, solving problems, and accelerating timelines, workshops bring together key decision makers, constituents (including end-users), and facilitators to work through a problem.

**War Room:** A war room is a visual centerpiece where the team collects and displays key information. It can either be a physical location (room with walls/whiteboards), or virtual workspace (electronic documents) as long as it is updated daily with issues, risks, dependencies, plans, etc.

**Chat/E-mail/Instant Messaging:** Using e-mail to share information, ask questions, route documents, capture information, and track decisions is standard in most organizations. The next step is to enable real-time communication through the use of chat or instant messaging. Current chat tools (like AOL Instant Messenger) are starting to recognize the needs of business users and are providing new functionality that will help collaboration in the workplace.

**Real-time Document Collaboration:** the ability for two or more people to edit a document (e.g. Word, Excel, etc...) at the same time, seeing each other's edits in real-time, is most valuable in situations with distributed teams that require true document level collaboration rather than workflow.

**Workflow Management:** Managing the flow of all the information that a team or project produces can be a daunting task for small teams and almost impossible for large ones. One can alleviate this by implementing workflow management. This involves tools which enable the proper routing of documents and distinguish between the people who need approval rights vs. those who should be informed of the progress.

**Knowledge Management:** This component, of which document management is a subset, is probably the most important piece of the collaboration toolset. There are two types of knowledge to capture - explicit and tacit. Explicit knowledge is tangible and captured in documents and databases making it easy to absorb into a system. Tacit knowledge is contained in people's heads and therefore is difficult to capture. A good knowledge management solution, will offer a means for capturing tacit knowledge (e.g. roundtable discussions, knowledge communities, etc.) At the core of true collaboration is the ability to share and catalog all knowledge, ideas, standards, best practices, and lessons learned and to be able to retrieve that knowledge from anywhere at any time.

**Intranet/Extranet:** Creating an environment that allows individuals to work together is another important aspect of collaboration. Intranets (internal corporate websites) and Extranets (external corporate websites) are the most common approach to solving this problem. The Intranet and Extranet serve as an umbrella for collaboration tools and techniques. Intranets and Extranets can be used for many different purposes, from knowledge sharing, to document management, to bug/issue/defect tracking.