Redhand advisors

10

Keys to a Successful RMIS Implementation

Congratulations!

Your company has selected a new RMIS system, and you're likely wondering, "How do we get this up and running?"

Indeed, there are many misconceptions about implementation of a new system, but we are here with this e-book to help you plan accordingly.

Implementation is the foundation of your new RMIS system, and it's crucial that it is done right the first time. Without a strong implementation process, you risk having a problematic system that will create challenges long after implementation has ended. Unwinding parts and pieces of the system the modify or fix things once it goes live can be quite difficult and costly.

In this e-book, you'll find 10 key steps we advise for a successful RMIS implementation. We hope these steps help you get through the implementation phase of your system efficiently and without any major hiccups!

Patrick O'Neill
Founder and President
Redhand Advisors

1 Create a steering committee

Although this isn't likely the most important step, it certainly must be the first. Implementation will proceed smoothly if driven by a team of stakeholders, led by change agents who fully understand the scope and purpose of the project. Aim to have the steering committee represent a wide cross-section of functions within the organization.

TIP: *The good news is, putting together the committee may be easier than initially appears, as you already may have tapped into these team members throughout the needs assessment.*

2 Develop a project charter

This is Task No. 1 for the steering committee. Set benchmarks and clear goals and objectives for the project. Include in the charter the project's ultimate deliverables, desired outcomes, budget and expected ROI, as there will be internal and external costs associated with implementation. Make sure to set up a financial safety net as well, since

unexpected costs can arise during implementation, and some organizations will charge for the use of separate resources such as IT, for example. Create a checklist or visual timeline to compare against actual progress.

TIP: *There's no rule about how long the project charter should be. Successful charters can be a one-page document or a five-page document.*

3 Coordinate project management internally

Vendors today typically take an iterative design and development approach, building systems in smaller chunks and bringing them to the client for testing in parts of the whole. The vendor then goes back to work on the next chunk of the system. For complex projects, this can create delays and mistakes if there is no internal project management or champion making sure tasks are being completed. Your steering committee can spearhead this, so as the vendor is working on the next phase, someone on your team is coordinating schedules of internal resources.

TIP: *For smaller organizations, the internal project manager won't need to be a full-time job, but if you can assign a team member with project management experience, it will be a smoother ride. Expect to devote about 10% of the implementation work hours to internal project management.*

4 Emphasize change management

No matter how well the implementation process goes, without good communication about the changes coming down the pike, success of the new system will be jeopardized. Communicate with all potential users who will be affected by the change and sell them on why this will be better for them and is so important for the company's success. Don't assume that because you have key stakeholders on your steering committee that everyone will get the memo.

TIP: *The internal project manager can take on this role and keep people informed on progress and any scheduled changes on a regular basis. Doubts will creep in for many, but if you can get buy-in from more*

than just the key stakeholders, your chances of a smooth implementation go up.

5 Consider a third-party consultant

Consultants can't do all the heavy lifting of the implementation, but there's a significant amount of burden they can take to help streamline the process. A third-party is the subject matter expert who can oversee the project and offer an independent opinion when decisions need to be made during implementation. Smaller companies that cannot devote time and effort to, say, a nine-month long system implementation certainly should consider a consultant, who can keep the focus on the project and often complete some of the tasks more efficiently because of their experience.

TIP: *A third-party consultant can regulate the speed of the project in both directions. The consultant can keep your client-side tasks moving so that the vendor isn't waiting for you to catch up and review finished work, but he or she can also keep vendors honest on whether shortcuts can or should be taken to finish a particular*

task more efficiently. Consultants also can recommend options that the client may not know that could improve the implementation or system.

6 Take advantage of process improvements

Too often, organizations miss the boat on implementation being an opportunity to improve their processes — they take everything they have and just put it into a new, faster system, but they don't change a thing about their process. New systems have great capabilities and new workflow designs, automation, and alerts, and you should take advantage of that. For any organization on

a legacy system or using manual processes, the tools available are significant improvements to processes even using standard configurations. Let technology revolutionize the way you manage claims, don't warp technology to match your process.

TIP: *Adapt your business processes to fit the out-of-the-box tools from the new system rather than customizing it to fit your legacy processes. The more customization you try to wedge into the RMIS, the more standard configurations you push out, decreasing the RMIS' effectiveness and increasing the potential for it to fail. Consider, too, that the only people who know how to fix a customized*

feature that fails are the ones who designed it. When that person is no longer with the company, what happens to that feature?

7 Focus on data conversion and use

Data conversion is a monumental task that absolutely needs to be executed properly. If implementation is the foundation of the system, then data is the bricks and mortar. If you're transitioning from a historical system, there may be a lot of data that only you will likely understand. Therefore, implementation is the time to clean up the data and get it right, because if you have garbage data going into the system, you're going to get garbage out of the system. Invest the time needed and analyze how the data will be used in the new system.
TIP: *Plan how data actually will function in the new system, how it will come in, how it will be presented, etc. Map out all data to a consolidated list that gets team members what they need to perform their duties best. If the data isn't set up correctly in the system, outcomes will not be as expected.*

8 Test, test and test again

Most organizations expect a system to work when the vendor signs off on it, but just because the software doesn't have a bug, doesn't mean it functions correctly. It's on the client to ensure that, in a workflow, for example, that all the proper steps take place and all notifications happen at the end. The more people involved in the process, the better, and stakeholders should recruit other subjects to test the system as well.

> # Data conversion is a monumental task that absolutely needs to be executed properly.

Additionally, changes don't have to be based on a broken aspect of the system; maybe there's a tweak needed to allow the system to perform better? Now's the time to find those instances.

TIP: *The testing phase can be an early entry point to get some wins for the implementation by getting people invested in the process,*

trying the new system out and gaining early buy-in.

9 Train anyone with access

Don't wait for go-live to begin training for the general team members who will have access to the system, or you will lose too much ground after the switch. Training should be customized by user or department function to deliver the most effective experience, and it should be tailored to the client's specific configuration, versus a generic platform.

TIP: *A key stakeholder in the implementation should help drive the training with the vendor, interpreting the program as training goes along and answering questions that are specific to the organization's configuration as needed.*

10 Consider a phased approach

For more complex implementations, if you can break it into

phases and drum up early enthusiasm and success, it will make the project a little less daunting. A phased approach also will help manage project workloads and execution. Some functions and departments don't need to be implemented right away, so focus on getting the core components live first, then phase in secondary functions as you go. Make sure your steering committee and project manager maintain their champion status and enthusiasm through change management efforts as well.

TIP: *On average, a typical, full implementation takes nine months. A phased approach might extend that to 12-15 months, depending on the size of the project. Additionally, don't jump to the next phase of implementation right away; make sure that the system that just went live works right before moving on to the next phase.*

A red-letter day

Executing on these steps to plan for your system implementation should lead you to success on the project, making your go-live date more of a minor celebration rather than a day of dread for your team members and customers. ⌐●