CASE STUDY

The Programmers and Staff Spoke a Different Language
Communicating Needs During Software Implementations

Think about the last time you had a conversation with an IT professional about your software or hardware systems. Did it sound like "geek"? That's not surprising. It's a wonder any system implementation goes smoothly when end users and IT professionals truly speak a different language. A case in point:

The Challenge:

A hospital system was charged with identifying and implementing a reporting system to track errors and omissions that occurred within all of their facilities. The system needed to be easy to use as most of the employees were not accustomed to entering information into a computer. The winning vendor offered a product that was highly customizable. This seemingly great benefit became a headache for both the vendor and the hospital system. Here are some ideas to consider:

1. **Be sure to understand how you do business.**
   Create a list of needs. Map out your daily business processes. Clearly identify how information flows within your organization before undertaking any design conversations. Talk with those who will be using the new system, identify problems with the existing system. Tryout the proposed system to identify how your current way of doing business will be impacted.

2. **Prioritize your needs.**
   It is amazing how quickly the scope of any project can grow, especially when you are implementing new custom software. Identify the "must have" requirements and the "nice to have" components. For example, does the new software need to integrate with your existing software? Can you implement the basics and upgrade to add components at a later date? Do you have the required hardware or will you need to invest in additional infrastructure?

3. **Choose your Team wisely.**
   Include end users, IT professionals, and managers on your team. It can be very helpful to include an outside facilitator or project manager to keep the discussions moving and serve as a mediator between what the end users want and what the IT professionals can deliver. The project manager can also keep track of milestones and deliverables that can be lost in the day-to-day business activities of the team.

4. **Document your actions.**
   Misunderstandings occur frequently because action plans are not developed, documented or followed. Questions and issue logs should be available for all to see. There should be no hidden action steps. Everyone should know the timeline and what's expected of them. You don't need to use fancy software—spreadsheets and storyboards are great. Use what your staff knows and understands.

As a result of this project:

- Custom screens were developed that mirrored the requirements of the original paper form. Click boxes and dropdown selections were used to standardize the data for reporting purposes.

- Unlike paper reporting, once an incident was initiated it was no longer "lost" on a manager's desk. The reporting was considered to be far more accurate although it was unknown how many reports were lost prior to implementation.

- The software was rolled out to 8 hospitals within the healthcare system.

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