

The Five Sure-Fire Strategies for Gaining Management Approval for Hospital Call Center Software Projects



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Introduction

An ever-increasing number of hospitals today have implemented call center software solutions because of a powerful combination of benefits. Thousands of organizations have seen firsthand how these systems cut costs while improving patient safety and caregiver satisfaction. Costs are sharply reduced by enabling staff to process calls more efficiently and by cutting down the number of calls operators need to process thanks to self-service applications. Patient safety is improved thanks to faster and more reliable communications throughout the hospital. Such streamlined communication greatly lowers the number one cause of sentinel events in a hospital – communication errors. And caregiver satisfaction is enhanced because all staff members – doctors, nurses, and other personnel – now have more accurate and more dependable communication amongst each other in a variety of ways.

However, despite the widespread consensus about the compelling benefits of solutions like this, at times gaining approval for a new system can be challenging. To you, the value is clear. But now you face the task of getting other decision-makers on board with your critical choice. It is important to get the appropriate people in key areas such as IT, Telecommunications, and Finance, as well as the executive team and the Board of Directors, to see distinct value in the system proposed. If your organization is like most hospitals, you'll have to follow a process involving several stages of information gathering and approval. This is not an easy process, but being prepared with the right facts will help you stay focused, and significantly improve your chances of getting the project approved.

Hospital Call Center Software Overview

A typical hospital call center software suite consists of a number of elements that can be implemented individually or all at once. Operator consoles provide an extremely efficient means of accessing all the information and procedures necessary to process all your calls effectively.

Integrated telephony interfaces allow you to perform operations like transfers and paging with a single click of the mouse. A web portal is a popular element because it lets your personnel go online to update information, such as on-call calendars, and use the site for directory lookup and paging. Speech recognition modules are used to offload a call center from calls that can be handled automatically. Good call center software can also support the ever-important skill-based call routing so those critical code calls go to your more seasoned operators. In addition, the right solutions can support automatic call distribution (ACD) so the incoming calls are spread out evenly. Call recording provides an audit trail of activities within a call center and improves quality through call scoring and other measurements. Many hospitals use E911 software, too, which enables emergency responders to find the exact location – which room, which wing, which building – of a 911 call. Finally, an integrated mass notification system can alert a number of people very quickly to everyday or emergency events.

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1. UNDERSTAND YOUR ORGANIZATION'S STRATEGIC INITIATIVES

Most organizations start the software acquisition process with a high-level presentation to an executive team to gain initial approval before further research into the project can begin. This is a critical step. Before this meeting, you must research and fully understand your hospital's overarching goals and strategies. To ultimately gain budgetary approval, the call center project has to directly contribute to or align with one or more of these key initiatives. Be prepared to provide detailed information on how this project is strategic to the hospital (e.g., if a key strategy is cutting costs, you can point out how a system like this can allow you to do more with fewer resources; other examples may include how the project will increase patient safety, or be a more attractive place for

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caregivers to practice medicine). Remember that you'll be competing with other projects for limited budget dollars. If the project is not adequately aligned with an important strategy, you increase the risk of having the project stall—or worse yet—having the project get cancelled after a lot of hard work on your part.

2. IDENTIFY KEY INFLUENCERS IN IT AND FINANCE AND ALIGN YOURSELF ACCORDINGLY

During the approval process, you will need to gain alignment with key decision-makers in different areas of your hospital: IT and Finance as well as the Caregivers and Physicians. You will need to determine which people in each area have approval responsibilities. Explain to these people how the call center project will benefit his/her area of concern. For example, IT will be interested in learning about system integration, product architecture and long-term maintenance. Finance will want hard number projections for evaluating system payback. Caregivers or physicians will be interested in how they can use the system day in, day out, to streamline their communications while improving patient safety and service.

To build consensus, you need to determine the right time to bring each key influencer into the planning process. As you progress with planning and research, it is important to keep key influencers well informed of the high-level goals and activities and how the project is progressing. Share reports with each group that tie back to the hospital's strategy. For example, describe how the system saves IT costs. Avoid being too tactical, like explaining the details of how the system works.

3. RESEARCH AREA ONE: SPECIFIC INFORMATION NEEDED FOR KEY INFLUENCERS

Now's the time to conduct thorough research to figure out which messages should be directed at which group in order to build support for the project. Consider the IT team. This group is

probably already coping with tight budgets, so they will need to know the cost and time involved in implementing and maintaining the system—and what their actual involvement will be. Pay close attention to system features that will ensure IT has a long-term partnership with the system vendor. Such a relationship will make it easier for IT to do more with its limited resources and will go a long way toward your ability to gain approval and even build some excitement about the benefits. For instance, does the call center system support a wide variety of PBX systems so future changes could be accommodated without changing the call center software? Does it support multiple database types (e.g., SQL Server or Oracle) and operating systems (e.g., Linux and Windows) so future technology choices will not necessitate a change of partners? Does the vendor have a broad product suite that will meet your current and future needs? If so, this should translate into less integration between the various modules, which can be a major component of system cost.

Another area of critical concern for a hospital is system security. Your task is to find out whether the vendor's software has been through any security validation by an external third party? The use of the software by a well-known hospital may be reassuring, but may not be enough as security policies can vary significantly from hospital to hospital. A large number of leading hospitals can provide more assurance, but there is no substitute for external validation.

Finance will be interested in how the system can impact bottom-line performance. Consider metrics that matter to Finance – operational cost, productivity – and present the project as an investment to better such areas.

4. RESEARCH AREA TWO: COMMON INFORMATION NEEDED FOR KEY INFLUENCERS ROI

Return on Investment (ROI) is, simply put, the ratio of money gained on an investment relative to the amount of money invested. ROI is often

The Five Sure-Fire Strategies for Gaining Management Approval for Hospital Call Center Software Projects

extended to a measurement of payback, which incorporates the time it takes to achieve the ROI. Most hospital call center projects receive payback between nine and 18 months of implementation, depending on how the system is leveraged within a unique environment. The best practices-based functionality within a call center solution offers a myriad of benefits that ultimately result in higher efficiency and lower costs—key drivers in ROI: Real-time interfaces to the various information sources, integration from the computer to the telephony equipment (CTI), and mass notification tools all improve call center throughput and drive cost reductions. Speech recognition and secured web access to information reduce call volumes and also drive bottom-line benefits. When you determine ROI make sure you start with a detailed and accurate methodology based on your company's actual data. A strong ROI analysis consists of detailed metrics, tangible examples and unique operational considerations that factor into your project.

Make it YOUR ROI, not a generic example. You'll need to include internal factors, such as your IT department's time, travel expenses, and a host of other items as required by the assessment tool you use. To project and calculate your return on investment, you can ask potential vendors for ROI tools and customer references that back up their estimates. It is important to validate these vendor-provided improvement assumptions by checking out customer testimonials, press releases, and case studies during the evaluation cycle. Feel free to ask your vendor if you can talk with some references and ask those organizations about their ROI of the system. To begin your ROI assessment, capture current data about your company's processes. Every area of benefit must have an associated current cost and future percentage of improvement assumption. For example, if you currently require X number of operators to handle X number of calls each day, figure out the approximate cost of this now and with a system in place. In doing so, be sure to include a fully-burdened cost for staff and not just cash compensation. Fully-burdened cost includes

payments your organization makes for a person's social security, benefits, space, and other costs.

Some organizations use figures such as an additional 40% on top of pay as a burden amount. Check with your internal financial analysts to learn the formula for your organization. Then, base payback requirements on internal rates of return, payback periods or net present value criteria defined by your finance department. They should be able to provide a target range for investments. Once you are armed with this data, your project budget becomes defined, and you know what your company can afford to invest in a system. This is more appropriate than asking for cost estimates from vendors that may or may not be a realistic budget foothold.

— **Functionality**

In addition to an assessment of the ROI, a full understanding of the system functionality is also important, especially for the telecommunications team. The best way to evaluate this is to complete a detailed request for proposal (RFP) with your vendor to ensure it offers the right functionality for your strategic initiatives and particular areas of operational concern. Detailed system functionality requirements should be linked to strategic benefits or documented process improvements based on best practices. This is another area where you should ask your vendor to give a live demonstration to prove this functionality is available in the current release of the product you will be buying. Many vendors will demonstrate functionality that is 'on the radar' for the future. Some vendors even demonstrate functionality that is years down the road.

When considering functionality, think about the future. What kind of beneficial add-on modules does the vendor offer that you could put in later? If, for instance, you decide call recording would be valuable for your organization, can you get it from the vendor? This is an important factor because the ability to tack on something like call recording from your console vendor would reduce future integration spend – not to mention headaches.

The Five Sure-Fire Strategies for Gaining Management Approval for Hospital Call Center Software Projects

Vendor Viability and References

Implementing hospital call center software is a major decision for you and your hospital. The vendor you select should become a long-term, strategic partner for your business—not a short-term sales contact. Mitigate risk by learning about the viability of the vendor whose system you are championing. Ask questions about how long it has been in business. Is it financially sound or is it struggling to devote money to R&D and customer support? Some of these questions will be included during the RFP process, but if not, you should make a note to ask. There is no substitute for seeing the financial statements of the vendor.

RFP questions provide wiggle room and reports such as D&B can be deceiving. Reviewing the balance sheet and income statement of the vendor provides a clear vision of the financial footing of the vendor. If the vendor is not willing to share financials, this is a red flag. The years of experience of a vendor are no guarantee that the vendor will be around tomorrow.

Be bold with references because oftentimes they carry proof points to strengthen or refute your case. Talk to a number of the vendor's customers that are currently using the system in a similar situation to yours. Give the vendor some criteria that you would like to see, including perhaps the same PBX, a similar-sized hospital, a geographic area (to make visits easier), and a similar set of solutions.

So as you can see, whether it's part of the RFP process or separate, you need to know what the system can do, how organizations like yours are faring with it, but also who's behind it – what kind of support the vendor offers, what sort of R&D investment the vendor is making, and how strong the company is financially. So the key is to make sure you're getting a great system from a great vendor, not a great system from a fly-by-night vendor that could be out of business in the near future, leaving you without support and direction.

5. OBTAIN FINAL APPROVAL FROM EXECUTIVE TEAM / BOARD: MAPPING BACK TO STRATEGIC INITIATIVES

Once you have gained approval from IT and Finance, you will need to present the final project back to your executive team/CEO/Board of Directors. These people will be interested in how the system will improve bottom-line performance and patient safety. Map all of the information you've learned back to strategic initiatives for the strongest impact. At this point you will be well-armed to make a strong case.

Conclusion

The process of evaluating and gaining approval for a hospital call center project is a critical undertaking for your organization. Fully understanding the steps you should take in winning the support of key people at various levels of your company will help speed the process. Although there is a lot of research involved in finding the right system, the immediate and measurable results will be well worth your effort. You will be able to better leverage your call center to do more with less, improve patient safety and delight your customers.

Summary Checklist (See each section within the report for a more in-depth explanation)

1. Understand Your Hospital's Strategic Initiatives

- a. Research and clarify strategic initiatives
- b. Verbalize how the call center project is in line with these goals
- c. Gain initial approval from executive team Board of Directors to move forward on evaluating the project

2. Identify Key Influencers From IT and Finance and Align Yourself Accordingly

- a. Determine the key influencers for IT and Finance

The Five Sure-Fire Strategies for Gaining Management Approval for Hospital Call Center Software Projects

- b. Discuss the appropriate time to bring each into the project
- c. Provide regular reports that tie progress back to strategic initiatives

3. Research Area One: Specific Information Needed for Key Influencers

- a. IT – develop messaging for key concerns: cost/time required to implement and configure the system, architecture (if applicable)
- b. Finance – develop messaging for key concerns: ROI, how the software will impact bottom-line performance

4. Research Area Two: Common Information Needed for Key Influencers

- a. Return on investment (ROI)
 - i. Choose a strong ROI tool
 - ii. Capture key data internally to complete assessment
 - iii. Request vendor references and demonstrations as proof of these capabilities
- b. Functionality
 - i. Choose an hospital call center-specific RFP template – this tool should cover all detailed aspects of functionality requirements, system configuration and company details
- c. Vendor viability and references – research the vendor itself using the RFP and other questions to determine if there are areas of concern (e.g., financial backing)

5. Obtain Final Approval From Executive Team Board: Mapping Back to Strategic Initiatives

Present all findings at executive or board meeting to obtain approval

Next Steps

Amcom Software has been helping hospitals automate their call centers for more than 24 years. Of the top 18 hospitals in the United States (according to the annual report published by U.S. News and World Report) 14 rely on Amcom solutions to cut costs, improve patient safety, and provide superior customer service. With this tremendous experience in health care, Amcom has developed over time many tools to help its customers. So as you move to the next steps in your search, Amcom can provide you with ROI calculators and RFP templates at no charge. Additionally, Amcom can lend references of other hospitals that have gone through this journey, so you can hear from them and compare your experiences.

About Amcom Software

Amcom Software provides technology solutions for organizations that depend on speed, accuracy, and productivity to manage mission-critical day-to-day, emergency and event-driven communications. Amcom's advanced solutions are used by more than 1,400 leading corporations and organizations in healthcare, education, hospitality and government.

With the recent merger of XTEND® Communications and Telident 911 solutions into Amcom Software, the company further solidified its market leadership, with the combined companies' committed employees, broad expertise across several distinct markets, strong technologies and growing client base. For more information, call (800) 852-8935 or go to www.amcomsoftware.com.