ANALYTICS MIGRATION PROGRAM

Seven Best Practices for Improving Analytics
through an IT Transition

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THE PROBLEM

In the first of our series on successful IT transitions, Santa Rosa shared a time-proven perspective that true adoption, not system usage, is the real measure of success for IT transitions. Usage and adoption are an essential duality – the IQ and EQ of success, respectively - which are synergistic yet distinctly different. An essential implication of that duality is that any IT transition must be considered through a consumer (user stakeholder and decision-maker) lens, and not just a technical one.

Examining an IT transition through the eyes of the consumer is especially important for business intelligence and analytics (BI&A). During any major IT system transition, such as an EHR conversion or ERP implementation, organizations pay a hefty price for giving short shrift to the controlled migration of BI&A solutions (reports, dashboards, scorecards, etc.) Too often, it leads to poor adoption, frustrated stakeholders, inflated transition costs, excessive post-go-live remediation,

and even risks to mission-critical performance.

These big problems start small. Consumers can't find the analytics and reports they used to rely on. If they do know where to look, the names have changed. When they manage to find the right one, the layout and even information and data definitions may have shifted. Consumers get frustrated, blame the new system, and deluge IT with 'new' requests for new BI&A solutions or changes to existing ones. It happens almost every time.

The lack of a robust and comprehensive Analytics Migration Program can damage or even derail the otherwise best planned IT transition that takes many months, if not years, to rectify (especially in highly competitive markets). An effective Analytics Migration Program avoids these issues, and can help to make a fair transition a good one, and a good transition a great one.

Poor analytics migration programs can derail IT transitions. Effective programs make fair transitions good, and a good transitions great.

TYPICAL ANALYTICS MIGRATION EFFORTS ARE LIMITED

Understandably, CIOs and their IT teams often devote minimal attention to analytics migration. Typical efforts focus on the 'end game' – what will be available to consumers following go-live, and how to technically make sure those solutions are populated and made accessible. This end game "snapshot" was probably the only key aspect of BI&A included in the original IT system evaluation and selection process.

During that process, the new vendor undoubtedly promised the new technology will fix all the flaws in the organization's BI&A program (a consistently questionable promise as explained in this white paper). Everyone, according to the vendor, will be delighted with the exciting new reports, dashboards, and scorecards available to them.

Let's assume the vendor is correct and the BI&A capabilities after go-live will be much better than before. But if the transition to improved BI&A is confusing and chaotic, it undermines the benefits and ROI of that significant investment. A rigorous and detailed analytics migration effort is required for consumers to realize post go-live promises. The journey is indeed just as important as the destination.

PAY ATTENTION TO THE JOURNEY

A comprehensive Analytics Migration Program ensures consumers have a positive and rewarding experience throughout the transition. It builds trust and confidence for the transition and the new system. In turn, consumers whose vital BI&A solutions remain undisrupted are more highly satisfied, embrace the new system through strong adoption, and protect performance through consistently informed decision-making.

An effective Analytics Migration Program has other subtle, but no less impactful, advantages:

- Identifies meaningful 'gaps' in the BI&A end game and verifies the vendor's promises

- Establishes a systemic, programmatic foundation for continuous improvement of data quality, governance, and stewardship

- Avoids the usual deluge of requests for 'new' BI&A solutions that follows many IT transition go-lives (especially EHR conversions) when a consumer 'can't find' what they used to rely on

- Preserves required historic analytics and comparisons, such as trending, despite changes to metric definitions or data derivations

A rigorous and detailed analytics migration effort is required for consumers to realize post-go-live promises.

A comprehensive analytics migration program builds trust and confidence in both the transition and the new system.

The details of an organization's Analytics Migration Program must be tailored to its unique situation, transition, and culture. At Santa Rosa, our proven approach to analytics migration suggests seven 'best practices' for maximum benefits and success:

1. Map pre- to post-go-live BI&A solution inventories

OVERVIEW:
Most efforts at BI&A solution inventory mapping center on financials only, and fail to address clinical and operational needs. Before going live, organizations must carefully catalog the existing inventory of all BI&A solutions, analyze and prioritize the inventory, and map into the anticipated post-go-live inventory.

ADVANTAGE:
Serves as a catalyst to retire low usage solutions, prioritizes existing solutions in terms of value to consumers and business goals, and reveals key gaps in solutions to be filled prior to (or soon after) go-live.

2. Define the data quality ecosystem for each BI&A solution

OVERVIEW:
For each pre- and post-go-live BI&A solution, decompose the solution from business/clinical need and use case (i.e., what decisions are made) through metrics and their exact derivations to individual data elements and their system (or user) source.

ADVANTAGE:
Identifies any significant changes in pre- to post-go-live metric derivations and data definitions decision-makers must understand in advance.

3. Establish an intended approach to historical metrics and data

OVERVIEW:
The significant changes discovered in the prior 'best practice' often calls into question how (and how much) historical information will be handled for trending, period-over-period comparisons and benchmarking purposes. The intended approach may vary by area and function. For example, it may recast years of historical data consistent with post-go-live derivations and definitions, then explain and adjust for a discontinuity in that historical data.

ADVANTAGE:
Improves consistency and continuity of BI&A solutions while informing decision-makers of expected and planned changes ahead of time.

4. Deliver a consumer communication, education, and training campaign

OVERVIEW:
Armed with the above insights and discoveries, prepare and execute a targeted campaign to inform and prepare decision-makers for post-go-live BI&A solutions and changes. This campaign begins before go-live and should continue for a few months post-go-live.

ADVANTAGE:
Enables decision-makers to understand and adapt to the anticipated BI&A changes in a manner that minimizes disruption to decision-making and ultimately performance results. Also mitigates the post-go-live deluge of requests for 'missing' solutions and associated consumer frustration.

5. Initiate a systemic and comprehensive data quality improvement program

OVERVIEW:
Any major IT transition — especially an EHR conversion — should establish a continuous loop toward data quality improvement. The input into this loop may be user-side incident reporting, coupled with automated data quality measurement results.

ADVANTAGE:
Promotes rapid exposure of unforeseen metric and data quality issues during the transition, and establishes a sustainable and replicable program for enterprise-wide data quality improvement.

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6. **Update any data management systems and tools**

OVERVIEW:

Data management and governance, tools, such as Informatica or Collibra, must be updated to reflect any changes in metric derivations and data definitions as well as exact data sources. Similarly, automated data quality measurement rules and models should be updated.

ADVANTAGE:

Ensures consistency in data management utilized by stakeholders across the enterprise, while preserving the benefits and value of systems and tools.

7. **Incorporate BI&A solutions changes into consumer's access points and visualization layers**

OVERVIEW:

Leading BI&A organizations understand the vital role BI&A access and visualization play in consumer confidence and satisfaction, as well as education on metric derivations and data definitions and sources. This user-side information must be updated as needed.

ADVANTAGE:

Maximizes the user-facing assets and reinforces the communication and education campaign, while putting changes to BI&A solutions at the fingertips of decision-makers when they are considering those solutions.

PRACTICAL APPLICATION

Santa Rosa's 'best practices' are largely iterative rather than purely sequential. They should be carefully coordinated with IT, BI&A governance and the leaders of the IT transition itself. These best practices must be tailored to the organization's unique situation, environment, and needs.

A comprehensive, proactive Analytics Migration Program is an essential aspect of any major IT transition. It can make all the difference in how consumers experience the transition and help them navigate the disruption of moving from today's reality to tomorrow's end game.

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About Santa Rosa Consulting

Santa Rosa Consulting provides management advisory services and technical consulting expertise across the full range of IT vendor products and systems, delivering solutions specifically designed to address the needs of the healthcare market. Founded in 2008, Santa Rosa Consulting is managed by industry veterans with an average of 20 years of healthcare information technology experience. Santa Rosa is recognized for delivering world class services and solutions; and has received Modern Healthcare's Best Places to Work in Healthcare award six years in a row (2012-2017). For more information, visit the company's website at www.santarosaconsulting.com or call 1 (866) 944-4772.