

Aligning Technology with the Organisation Using Focus and User Groups

Simeon Owens

Central Remedial Clinic,
Vernon Ave, Clontarf, Dublin 3, Ireland
sowens@crc.ie

Abstract. As an IT Manager of nine years in a small healthcare organisation, which has transitioned from a minimal base of IT to fully fledged systems in place, I have discovered two structures which have helped enormously in this transition. These structures are firstly, the focus group, which looks at the IT requirements of the business, and secondly the user group, or a group of super users, which help in the day to day running of the systems. I have put together a number of lessons, which I have learnt over the years through experience of the workings of these groups, the benefits of them and the value they bring to the organisation.

1 Introduction

I am the IT Manager of the Central Remedial Clinic for the last nine years. The Central Remedial Clinic provides a range of specialised services for children and adults with physical disabilities. Its facilities and services are available to people from all over Ireland. It is a non-residential voluntary organization.

When I started my work within this organization, the technology in the clinic consisted of number of standalone PC's and an old AS400 system. This system simply collected attendance numbers for management reporting. Now, however the clinic has a network spanning five national locations, has three hundred networked PCs and uses the latest virtualisation technologies. The AS400 system has been replaced by a comprehensive MS SQL server based Patient Administration System.

This new system, which took me three years to research, source, evaluate and implement. The system needed to be flexible enough to suit the particular specific needs of our organization. Whilst the old system was bespoke, the new system needed to be a packaged one, and therefore eliminate ongoing development costs. It has now been in place for five years.

The use of a focus group, during the process of researching and sourcing the new system, provided an invaluable tool in ensuring that all the needs of the organization were met in the new system. During the implementation stage the user group of "super users" provided excellent feedback and support.

Whilst using these two structures over the years, I have collated many of the lessons, which I have learnt through experience. I also have collated the benefits and value they bring to the organization.

2 Aligning IT and the Organisation

Simply purchasing the technology is not enough. The linkage of the organisations functions and processes with the technology it uses is critical to the success of the organisation. The use of focus and user groups brings together the gaps in knowledge between the technologists and those who the systems are designed for. On the one hand, they enable the technologists to have a better understanding of the processes that they are trying to implement. On the other hand, it enables the clinicians and administrators to have a better understanding of the limits which technology brings. This in effect aligns IT and the organisation.

3 Focus Groups

3.1 Aims

The aim of the focus group is to bring together the technology and the organisation. Whilst the aim is very clear, it will mean significantly different things from the viewpoint of the different members. This is one of the major strengths of the group. A single group should be sufficient for most small organisations but multiple subgroups could be formulated for specific projects as required.

3.2 Structure

There should be an identifiable owner of the group. They should be an enthusiastic and driven supporter of the solution been developed. It is their responsibility to keep the show on the road. If the group leader is not motivated to drive the process forward, it will be extremely difficult to get results. The group should consist of people from different levels in the organisation, clinicians, administrators, as well as middle and senior management. This gives voice to the different expectations of all of the end users. Sometimes there will be separate existing structures such as heads of department groups, which can be linked into. The group should be as small as possible with each member being there to represent a particular group. The members should be carefully chosen to ensure that they hold the respect of their colleagues they represent. The group should evaluate its structure on a regular basis.

For technology integration to be successful, it is essential that the organisation “buy-in”. It is therefore essential, that at least one member of the group is from senior management. This person should hold a position of direct line responsibility, to those using the system. Support from the higher levels of the organization is also essential. This will ensure that the system is designed with the broadest viewpoint.

3.3 Functions

Rigid sets of rules pertaining to the scope of the group are unhelpful and often lead to a reduction in the creative thinking of its members. Specific areas of work should be agreed on and prioritised. Following this the scope for these areas can be agreed upon.

3.3.1 Information Exchange

Information exchange within the group, validates the reasons for decisions made, by the IT function with the organisation. It identifies areas where the organisation requires solutions easily. The exchange of information is especially important when things go wrong. This is outlined later in the paper.

3.3.2 New Systems Procurement

The “focus group” has a pivotal role in the procurement process of new systems. It is essential that the processes, which are to be included in the system, are fully understood. Many projects have failed, due to a lack of understanding of the processes involved, and the subsequent inability of the system to deal with them. Occasionally, it is not an IT solution is not required, but a change to the underlying process. In such cases the group will ensure that the process is correct before a solution is developed for it. In cases where departments use different processes to perform the same function; these need to be unified into a standard process.

The focus group identifies areas where proposed IT solutions can be implemented within the organisation. The broader view of the group enables the linkage to other systems, which would not have otherwise been considered.

3.3.3 Decisions

The group responsibility of decisions prevents the IT function making unilateral decisions which negatively impact the organisation. Priority, reflecting the organisations needs is also achieved.

3.4 Challenges

Unwillingness of end users to use systems, is often due to a lack of understanding in the reasoning as to why a system is in place. This is especially the case when statistical information is been collected. The buy-in from senior management, the involvement of all levels in the organisation, and the inclusion of direct line management in the group, helps to alleviate this.

Where possible, design of systems should include benefits to all the end users, ensuring that they both give to, and receive, value from the system.

Another challenge that can occur is when a long line of reasons is presented as to why the new system cannot be used. The reasons should be first collated and then examined. Many can be based on misconceptions. If this is the case, use of the system on a trial basis by those with the misconception can usually allay their fears. If the reasons are valid, they should be swiftly addressed. Eventually it will become apparent to everyone, that the list while partially valid, was mostly an expression of resistance to change.

Sometimes it just requires patience to wait for a particular set circumstance to happen to take the opportunity to highlight certain points.

3.5 When Things Go Wrong

Information exchange is one of the primary functions of the focus group when things go wrong. They facilitate the discussion of the problem from all sides, as opposed to

just a technical point of view. They recognise that the problem is not just an IT issue but an issue for the complete organisation. Interim solutions can be investigated whilst the original problem is being addressed. Following this, discussion around reasons for the failure can take place in a broader context. Processes can then be put in place to reduce the risk of it reoccurring. Some of the problems that occur are not technical, however, they are laid at the door of IT management. The group is in an excellent position to recognise this rather than it turning into a game of “hot potato”.

4 User Groups

4.1 Structure

The user group consists of only one representative or “super user” within each department or functional area of the organization. This ensures that there is clarity in the communication to and from each department. The group both meets together from time to time, however its primary communication is to a specified member of the IT department. As before its members should be carefully chosen to ensure that they hold the respect of the colleagues they represent.

4.2 Aims

The aim of the user group, is to ensure that the day to day running of the system, is applied as it was designed. They train users at a local level, and are aware of changes and upgrades to the system. Being made aware of policy changes, they communicate these to their colleagues at a local level.

4.3 Functions

4.3.1 Training

When systems are first introduced, formal cascade training from the systems vendor, to the “super users” can take place. This reduces training costs, as there are substantially less users to be trained. It enables the “super user” localize training before giving it to their user base. This localization of the training needs to be carefully managed. This is to ensure that the policies, which pertain to the systems, are included in the initial training.

With existing systems, the “super user” provides training to additional staff members in a standardised manner, throughout the organization.

4.3.2 System Performance

The “super user” best judges the performance of systems. They both use the system and hear all the smaller issues which users experience. They are in a better position to have objective views on system performance and identify the main pain points.

4.3.3 Problem Solving

When problems occur, users are encouraged to report it to their local “super user”. This report is then passed up the line to the IT Department. A big advantage of this is

the filtering out of smaller, solvable problems and it acts as a type of first level support. Another advantage of this is the “super users” are more in touch with their user base, and will therefore easily differentiate between the disgruntled user, and the one who has a real issue.

This gives the IT section, more time to resolve the issue, rather than fielding calls regarding it. The information exchange, between the IT function and the super users, will ensure users are aware that the problem is been given the appropriate resources.

If the problem is a result of a lack of knowledge by the user, the “super user” is in an ideal position to provide this extra training on an ad hoc basis.

Whilst users are encouraged to use this structure it is vital that they also be able to contact the IT department directly as otherwise a disconnect will occur between the users and the IT Department.

5 Conclusion

The new patient administration system was successfully implemented has now been in place for the last five years. The alignment of the organizations needs, and the new system, has been achieved through the use of the “user group” and “focus group” structures. The importance of the ongoing work of the focus group and user group continues as the needs of the organization change over time. This has been evident in new areas of the system been utilized which were not originally thought required. The length of time needed to implement the new system, through the use of these groups has proved longer than expected. However this has resulted in a better solution been achieved. The collaborative nature of the relationship between the supplier of the new system and the organization, has resulted in a better system both for the Central Remedial Clinic and for the suppliers other clients. Finally, the support from a strong IT team, who are committed to the success of the project, and who are aware of the benefits of “focus groups” and “user groups”, continue to be invaluable to the ongoing success of the new system.