



# Case Study: Organizational Approach to Patient Access

## PROJECT OVERVIEW

Culbert Healthcare Solutions provided advisory services to a large AMC to help the organization define their future access model and provide a roadmap to achieve their vision. It started out as an effort by the organization to improve the operations at the central patient access center that was struggling to meet the patient needs, and the needs of the ambulatory clinics that were supported. It was therefore the right time to step back, take a holistic view to improve access.

## GOALS / CHALLENGES

**Challenges:** (1) The centralized operation was viewed as the primary source of poor service and patient dissatisfaction. This oversimplifies the problem as there was no shared responsibility by the clinics; (2) Traditionally large academic centers are provider driven, with a larger focus on being provider centric rather than patient centric, making it difficult for an access center to meet the expectations of patients and providers.

**Goals:** Improve the current patient access operations in order to (1) Improve the patient experience; (2) Enhance the ability to satisfy patient demand in a timely manner; and (3) Optimize clinical resources and staff productivity.

## SOLUTION DESIGN / PROJECT MANAGEMENT

The Culbert team set out a project approach with the following deliverables: (1). Develop the future state patient access vision; (2) Provide a gap analysis between current state and future state in terms of people, process and technology; (3) Assess the change readiness, governance and execution risk; and (4) Provide an implementation road map.

To that the end the team undertook a 360-degree view of operations, policies and protocols at the access center, clinics, IT & Business intelligence teams. They observed and interviewed staff at all levels to get the “voice of the customer”.

A visioning session was facilitated with broad participation from key players and stake-holders to define the future vision, identify the congruity and the organizational readiness for change.

In addition, the team reviewed available data to identify a baseline and establish improvement metrics. A deep assessment of the current technologies and telephony system in place was performed. Current job roles were assessed as was the organizational structure, expertise, and staffing numbers at the access center.

The team provided a detailed report that provided a roadmap to achieving the vision and the future operating model, the gaps to be bridged, the variation to be standardized, the role changes, the staffing needed at the access center to manage the existing call volume, the governance structure to oversee the change and the technology and telephony improvements required. A detailed project plan that highlighted the priority of roll out, and the resource need was provided.

## KEY SUCCESSSES / OUTCOME

A multi-tiered plan was developed which garnered support by senior leadership and department chiefs. The model included specific details regarding access center staffing, organizational chart, training, technology and telephony. The plan also included development of practice standards for communication, patient responsiveness and scheduling standards. In addition, a detailed plan for governance, change management and leadership was provided. In such a discovery process Culbert’s collaborative and inclusive approach provides key intangible benefits. The organization and its leaders appreciated the deeper insights as to causes of inefficient operations which were not solely due to access center, and an understanding on how variation in functioning of clinics impacts access. Some of the local clinic leadership challenges were brought to the surface that allowed the organization leaders to manage change.

## LESSONS LEARNED

An effort like this, required a strong and engaged leadership, with an openness, without prejudice or hidden agenda. This client was an “ideal client”, which allows for open dialogue, creating solutions that work with the organizational culture and laying the foundation for implementing the changes. It is important to bring the frontline staff along. Proactive communication which dispels rumors, addresses concerns and inclusion of frontline staff builds credibility, transparency and participation for such an endeavor.

