

TITLE: How to Identify Key Stakeholders for a Healthcare IT Project

Imagine an EHR system that has been developed and implemented without any input from the clinicians who are using it. The project team responsible will be spending resources fixing problems while trying to regain the trust of leaders across the organization. If you fail to **identify and engage with key stakeholders** at the outset, this is how your IT project can end up.

When planning a project, starting off on the right foot can have tangible impact down the line. Hospital leaders should begin by identifying which departments will be affected by the project and making sure that those departments are well represented among the key stakeholder groups. As part of this process, hospitals should ensure that the project team has the right resources in place to act as a liaison between the stakeholders, project team members, and end users.

Because every project affects a hospital differently, **the project's scope will determine the range of staff who should be looped into the process**. For example, an Electronic Health Records (EHR) system migration would impact nearly every department within the hospital, while a smaller project may be focused around a single department. It's also valuable to consider what the potential impediments to a successful implementation might be, and to also solicit input from stakeholder representatives whose insights can help anticipate these impediments.

Here are **six key groups** to consider when identifying stakeholders to ensure you're getting all the input you'll need to plan your project:

Financial Stakeholders

Nearly every project will have a financial impact on an organization; therefore, the insight of board members, the chief executive officer, and chief financial officer is a valuable resource in the planning stages. These organizational leaders can help project managers understand the financial impacts of the project within the context of the larger budget. This enables project managers to better **understand what level of investment in a project is acceptable to key stakeholders**.

The project team must align project goals with the organization's overall agenda and priorities. Because IT projects can be very technical in nature, it's a challenge to communicate their scopes and outcomes in a way that's useful to the highest-level stakeholders. A skilled project manager will be able to **frame things in terms that effectively demonstrate value of a project** to the organization's objectives.

Medical Leaders

Including stakeholders from throughout the medical functions of the hospital is critical. From the chief medical officer to the pharmacy director, department leaders want to know that their team's specific needs won't get overlooked in a migration process. By engaging with these key personnel, IT project leaders are able to address any concerns about the impacts of the project up front and get valuable feedback.

Project management teams that **thoroughly consult and involve clinical leadership** at a hospital are often able to gain more credibility within the organization, which can bring momentum to a project and keep it moving effectively until completion. Medical leaders can also help to point IT project leaders towards valuable end-user stakeholders.

End-Users: Clinicians

[Outreach to potential end users can have the greatest positive impact on meeting project goals](#) and improving overall hospital efficiency. Physicians, nurses, and technicians are the ones who will interact with the new technologies on a day-to-day basis. **Establishing an open dialogue with select stakeholders at the end-user level early on will make it easier to understand the impact a new technology will have on this group in general.**

When seeking out these stakeholders, certain types of end-users can offer a greater value to project managers. A **clinical champion** serves a vital role in an implementation by supporting a project, acting as an advocate to other clinicians, and helping to communicate both down and upstream. Typically, a clinical champion will be well-versed in informatics and be an earlier adopter of technology in general.

Another useful stakeholder group are **super users**. While these individuals may be less outspoken or proactive than clinical champions, they are adept with new systems and assist their colleagues when they are having difficulties. To find these users, have the team planning the IT project **ask doctors whom they turn to for help with technology.**

Working with champions and super users yields significant benefits, but the ultimate success or failure of new software extends beyond them. **Those who are having difficulty making the necessary adjustments are equally important.** These individuals are often opposed to technological changes or skeptical of the value of new systems or workflows. Clinicians experiencing difficulty adapting to new tools or systems should be brought into the fold immediately. Discussions with them about their qualms with new systems can often provide useful input.

To ensure that these clinicians are effectively engaged, organizations should find resources that serve as an intermediary between IT concerns and those of medical staff. An experienced project manager will **leverage project supporters among clinicians and help to build support among those who are skeptical.**

Patients

When projects produce changes that could directly impact patients (e.g., revising a system they use to manage their health data) or alter the relationship between clinicians and patients, **it may be valuable to consider the patient's perspective as a stakeholder as well**. Establishing a patient focus-group or reaching out to patient representatives can help identify technology-related problems that trouble them, including confusion about how to make online appointments or find the information that should be accessible electronically.

Patients are the final customer of a hospital's services and their experience matters in how information services are shaped. If hospital technology moves in a direction that alienates patients, a backlash is inevitable. Therefore, it's useful to consider their perspective as a stakeholder in projects that change care management or delivery.

Vendors

Sometimes the vendors whose systems are part of the project and provide support for its implementation are forgotten stakeholders in IT projects. When an implementation or migration will affect other software used at the hospital, it may be valuable to **get vendor input to ensure smooth integrations whenever possible**. For example if a hospital is migrating from an EHR provider whose system is integrated with a PACS (picture archiving and communication system) to a new system, it's essential to ensure the effective integration with PACS is carried over.

Project leaders should identify what vendor support resources can be leveraged. They may be tools for existing staff to use, direct support from a vendor's service team, or consultants with extensive experience working with systems integration. Failing to utilize these resources can be a missed opportunity.

Billing and Audit Functions

Projects that will have a significant effect on billing processes or the process by which auditable records are stored should engage with billing or regulatory staff as needed. A project team adding insurance reporting and billing functionality to an existing system should **work with the financial leaders and accounts receivable personnel in the hospital to ensure that the updated software will be used as effectively as possible**.

Additionally, many hospitals are subject to audits related to a variety of government programs. In such cases, clearly coded data is essential to efficient production of records during an audit. Legal and regulatory officials within the hospital should be identified and engaged to ensure that changes to system design and record archiving maintain best practices within the audit space. Failure to work with these indirect stakeholders can lead to late-stage change orders on a project or costly mitigation projects in the future.

Continued Engagement and Communication Equals Project Success

Typically, IT-based projects have great success working with stakeholders in informatics, since many projects are driven from within this area of the hospital. The difficult part is to merge this informatics-driven thinking – solving challenges with the most efficient software and well-designed systems – with the concerns of all the stakeholders listed above; these individuals (and the teams they represent) may care more about budgetary concerns, avoiding workflow disruptions, or ensuring ease of use among end-users. As part of this process, the project team should consult, involve, and partner with them in developing effective solutions.