

WHITEPAPER

Organizational readiness: The critical success factor in an EHR implementation or merger integration

<https://www.chartis.com/insights/organizational-readiness-critical-success-factor-ehr-implementation-or-merger-integration>

Few initiatives reshape healthcare organizations as profoundly as electronic health record (EHR) implementation and optimization, whether replacing an existing EHR, integrating systems after a merger, or extending an EHR to affiliates.

Realizing meaningful, sustainable value from clinical technology requires aligning change requirements with enterprise strategy to build true organizational readiness. Success demands deep stakeholder engagement, substantial financial investment, and sustained commitment.

When leveraged effectively, EHRs enable a seamless flow of information that can transform care delivery. Yet many health systems struggle to achieve these outcomes, with some even facing financial losses and care team burnout.

The imperative for organizational readiness

Accelerated implementation timelines and vendor-driven models often demand significant additional effort for configuration and post-go-live optimization. While EHR vendors offer standard methodologies and project management tools, it is the organization, not the vendor, that must lead the change. Success depends on strong governance, clear structures, and effective change management to drive operational readiness and manage transformation.

The integrated nature of today's EHR environments demands a cohesive, end-to-end strategy; one that is both patient-centered and aligned across clinical and revenue operations. Without deliberate coordination, organizations can easily miss critical workflow intersections, resulting in operational inefficiencies, diminished patient and clinician experience, and significant financial exposure.

Addressing these factors early is essential. Organizations that fail to do so often face low adoption and revenue leakage. They also miss opportunities to enhance market position, financial performance, and care quality. However, organizations that prioritize organizational readiness can mitigate financial risk and

achieve transformational change.

Why organizational readiness?

Organizational readiness goes beyond change management; it ensures that clinical and operational leaders are fully prepared to take ownership and accountability for a seamless go-live transition. Organizational readiness answers critical questions, including:

- Are operations engaged and accountable in governance for decision-making?
 - Do our people know what they need to start, stop, and continue to do on the new system?
 - Do our people have the necessary training to do their jobs effectively with the new workflows?
 - Do our people fully understand the implications of new workflows, and are they prepared for high-impact workflows?
 - Are we maximizing the system to capture operational efficiencies?
 - Are the implementation and operations teams working together effectively to ensure success?
 - Is communication transparent and frequent enough at all levels to prepare for this major transformation?
-
- Do our people understand what's in it for them and their patients?
 - Are we certain that interruption to care delivery and financial performance will be minimal at go-live?
 - Do we know what success looks like and how to measure it?

True transformation occurs when an EHR implementation is approached as an enterprise program rather than as an isolated IT project. When leadership, operations, and technology are aligned around a common vision and a coalition of stakeholders share ownership, accountability and lasting commitment take hold. The result is not only a successful implementation but enduring value and sustained organizational performance.

Turning readiness into results

Organizational readiness programs supplement and work hand-in-glove with vendor technological workplans, tools, and product expertise. Successful readiness programs:

- Create organizational adoption and buy-in with clinical and operational stakeholder engagement.
- Create transparent governance for accountability.
- Facilitate effective and efficient decision-making that drives the program to on-time completion.
- Promote collaboration between IT and operations to support effective change management.
- Deploy a value realization framework with clearly defined accountability and improvement goals that align stakeholders to purpose.

- Ensure that operational, financial, and other impacts are well understood and mitigated.
- Ensure user preparedness with training and ongoing support to maintain proficiency.
- Mitigate risk by actively identifying gaps and proactively planning for resolution.

Immediate outcomes

Well-structured readiness programs generate measurable, near-term benefits that build momentum and confidence across the organization. These outcomes reinforce engagement and demonstrate the value of early alignment.

- Enhanced efficiency and streamlined workflows
- Improved quality and consistency of processes
- Better patient and customer service experiences
- Strengthened compliance with policies and standards
- Increased productivity across clinical and operational teams

Organizational results

Over time, the impact of readiness extends beyond implementation to shape enterprise performance and culture. Sustained alignment between operations and technology drives continuous improvement and lasting value, including:

- Operationally led governance and fully engaged stakeholders
- Enterprise-wide understanding of program vision, goals, and value propositions
- High adoption and buy-in for new workflows and technologies
- Minimal disruption to care delivery and revenue cycle performance
- Continued realization of clinical and financial value through technology-enabled transformation

Varying outcomes and experiences even with the same EHR

Organization A

Achieved \$50 million in cost savings, reduced LOS by 20%, achieved high physician satisfaction, and returned to pre-activation productivity in 2 weeks.

Leveraged operational ownership with physicians, clinicians, and key operational leaders driving the transformation.

Integrated clinical and revenue cycle teams, defining future-state workflows so the integrated system achieved clinical and operational performance requirements/needs.

Focused on the most challenging workflows for which the vendor didn't prepare them.

Focused on KPIs and areas where the organization sought to leverage the implementation to move the needle.

Had clear operational engagement and accountability at every level (from top leadership to front-line staff).

Integrated into training the impactful workflow changes rather than just focusing on features/functions.

Had deeply involved leaders who were aware of project milestones, issues/risks, and operational impacts.

Identified and addressed fears and resistance that often exist in an initiative of this magnitude.

Organization B

Posted a \$60 million loss for the quarter, experienced high physician dissatisfaction, and returned to pre-activation productivity levels only after several months.

Had implementations largely driven by IT with inadequate operational involvement in decisions.

Lacked senior leadership involvement in sharing the vision and developing clear expectations and accountability for performance.

Paid inadequate attention to the impacts of change and the need for frequent, transparent communication.

Focused on feature/function out-of-the-box training rather than organizational workflow-specific training.

Failed to develop and execute a robust plan for value realization.

Allowed teams to build/implement modules in silos.

Allowed relatively few people to make decisions rather than broadly engaging stakeholders in the decision-making process.

Suffered financial/revenue cycle implications for not clearly defining documentation expectations and querying workflow for coding.

8 critical factors for a successful readiness program

Effective organizational readiness programs go beyond preparing teams for change; they foster engagement, deliver value, and support ongoing transformation.

1. **Engagement through governance:** Effective organizational transformation is driven by operations-centric governance that actively involves all levels of leadership and stakeholders in decision-making, guided by a clear program vision and guiding principles. This approach drives decisions such as workflows, content, and tools that promote high reliability care, reduce costs, and enhance patient and provider experiences. Multilevel and multidisciplinary governance ensures those closest to the work make decisions, promoting broad engagement and fostering a sense of ownership. Actively involving leadership and stakeholders at all levels in decision-making enhances accountability, transparency, and alignment with organizational goals.

2. **Value realization:** For many health systems, value realization is the primary reason for pursuing transformation work. To successfully achieve desired outcomes, organizations must put in place a robust value realization framework. This includes setting clear KPIs aligned to strategic goals, assigning operational ownership, and maintaining a relentless focus on monitoring, reporting, and sustaining progress. Broad communication of value objectives and outcomes keeps stakeholders focused on the bigger picture and drives organizational commitment to continuous improvement.
3. **High-impact workflow analysis:** One of the most important elements of preparing for success is related to high-impact workflows. By addressing critical workflow impacts, identifying gaps, and standardizing across the enterprise to leading practice, organizations reduce risk and increase the likelihood of a successful go-live. Visual tools and clear communication help staff understand and embrace changes, reinforcing best practices and ensuring sustainability.
4. **Communication:** Transparent, targeted, and timely communication is critical throughout the readiness journey. A comprehensive communication plan builds trust and keeps stakeholders engaged by consistently sharing the program vision, progress, and benefits.
5. **Training:** While the intensity of training needs varies from one initiative to the next, every initiative will require some element of training. Training should be adaptive and relevant, tailored to the needs of diverse user groups. Beyond the nuts and bolts, the key readiness questions to be answered include: How do we best educate to ensure successful adoption? How do we ensure it is relevant for every user?
6. **Aligned and accountable operational leadership:** Transformation success depends on aligning leadership to the desired change. Successful programs clearly outline and communicate leadership and management roles and accountabilities, resulting in visible and active leadership throughout the organization. Leaders must do the emotional work of preparing teams to embrace the change and the tactical work of ensuring that teams are fully prepared to assume ownership of and accountability for new workflows, content, and tools.

Their role is critical in monitoring engagement, planning for and supporting go-live, celebrating successes, and ultimately assuming accountability for value realization. Skilled change agents help leadership foster excitement and urgency while ensuring every voice is heard.
7. **Peer support:** Comprehensive super-user and champion programs empower individuals to lead by example, support peers, and address operational changes at both staff and leadership levels. These champions help to sustain engagement, identify additional needs, and facilitate continuous feedback loops.
8. **Informatics and analytics:** Effective analytics and informatics capabilities are critical to capture, organize, disseminate, and interpret data for ongoing evaluation, process improvement, and informed decision-making. These teams support clinical and operational owners with the right tools at the right time to empower clinical and operational leaders to drive and sustain value.

By integrating these eight critical success factors, organizations can ensure readiness that delivers lasting transformation, stakeholder alignment, and measurable performance improvements.

Invest in organizational readiness early on

In any context, having an organizational readiness framework in place in the planning phase of an EHR implementation will position the organization for a successful journey and maximum return on investment, both immediately upon implementation and over the long term.

Additional Contributors: [Meg Underwood](#), Partner, Digital & Technology Transformation; and [Marley Jennings](#), Manager, Digital & Technology Transformation

Our services

[STRATEGIC TRANSFORMATION](#)

[PERFORMANCE TRANSFORMATION](#)

[DIGITAL & TECHNOLOGY TRANSFORMATION](#)

[CHARTIS CENTERS FOR AI & STRATEGIC INTELLIGENCE](#)

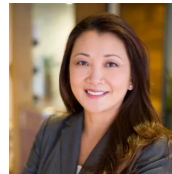
[PAYER TRANSFORMATION](#)

[STRATEGIC COMMUNICATIONS & CHANGE MANAGEMENT](#)

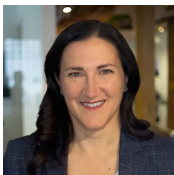
LEARN MORE ABOUT THE AUTHORS



Julie Massey, MD
Senior Partner



Vivian Patterson
Partner



Ann Boyer
Associate Partner