

From Transaction to Transformation:

How Chartis Helped Atrium Health and Wake Forest Baptist on Their Journey to Create an Integrated Academic Health System



The Client Challenge

The Chartis Group was engaged to support the clinical integration planning process for Atrium Health and Wake Forest Baptist Health after they finalized a strategic combination bringing together complementary clinical and academic capabilities to serve a growing, multiregional footprint across the Southeast.

The organizations had a vision to achieve meaningful clinical integration through a blended, academic-community service line structure that would transcend geography. A purposeful approach to clinical integration was critical to achieving that vision.

Navigating to Next: The Solution

Atrium executive management had experience in shared services and operational integration, so they knew that cross-regional integration would be complex and challenging. To be successful, they needed to swiftly launch and empower their clinical integration planning teams. Chartis worked side-by-side with the Atrium Integration Management Office (IMO) to assist in organizing the clinical integration effort and provide facilitative, advisory, analytic, and project management support. The IMO worked with the executive team to categorize clinical services and service lines based on intent to move toward a cross-regional enterprise model or a highly coordinated model for those programs that are more regionally oriented.

This led to a Phase I launch of 12 unique clinical integration design teams in which clinical, academic, and administrative leaders from the legacy organizations defined the path to synergy value realization, priority growth strategies and sharing of distinct programs, quantified clinical efficiency opportunities, designed a service line operating model, and identified milestones with associated success metrics. In parallel, an executive team was also launched to design the physician enterprise and faculty integration model and name key functional and clinical leaders for the future.

THE BENEFITS OF CLINICAL INTEGRATION

-  Enhance access and quality, particularly in rural communities and shortage programs
-  Improve clinical outcomes through growing research portfolio
-  Expand highly specialized programs, which benefit from greater volumes
-  Improve ability to compete against regional competitors and nationally ranked AMCs
-  Advance system-wide efficiencies through strategic functional consolidation

NAVIGATING TO NEXT: KEY COMPONENTS

Financial synergies are critical, but other opportunities for integration and transformation are even more important, including:

-  **FOCUS**
on quality enhancement and access optimization
-  **EDUCATE**
the next generations of clinical leadership
-  **TRANSFORM**
clinical care models and virtual offerings
-  **ADVANCE**
clinical differentiation and discovery

Client Impact

Chartis collaborated with key leaders across three geographic regions, 12 clinical design teams, and multiple adjacent disciplines to provide support, structure, and advisory through the first phase of clinical integration planning. Chartis also worked with the IMO to develop a Clinical Integration Playbook to support ongoing efforts led by the Atrium Integration Team, which has now expanded to more than 20 design teams.

Pushing the boundaries of traditional academic-community, post-merger integration enabled Atrium and Wake Forest to move rapidly, building organizational culture, extracting efficiencies to reduce unnecessary duplication and improve quality and value, and investing in differentiated clinical capabilities for growth. Through the combination, strategic partnership with Chartis, and the ongoing leadership of the Atrium Integration Team, Atrium and Wake Forest can now deliver better, more personalized care to their expanded community than ever before.



How We Are Making Healthcare Better

“Clinical integration is difficult, but as transaction size and complexity continue to grow nationally, clinical integration will be essential to achieve meaningful value through transformation of care. To truly transform care, clinical integration will be required for health systems to unlock new kinds of value beyond traditional scale economies, cultivate future growth and alignment, and weather strategic and economic challenges.”

—Brett Pederson, Director, The Chartis Group

Through a purposeful clinical integration planning process, Atrium and Wake Forest were able to unify multiple legacy component parts and new assets to begin the journey to one enterprise, encompassing:

2
 Wake Forest School
 of Medicine campuses

1,500+
 faculty

5,000+
 employed and aligned providers

NEXT INTELLIGENCE:

Transforming a newly consolidated organization through clinical integration requires attention to three key principles:

Collaboration:

Engagement and focused collaboration of all clinicians and administrators is critical to achieving successful change management.

Commitment:

Leadership commitment to change is essential to enable long-term, durable transformation.

Communication:

Communicating the benefits and progress of clinical integration unlocks the next level of value.

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