



**IT'S
TIME!**

**OPERATIONAL
EFFICIENCY
PLANNING KIT**



With the proper planning, health systems looking to increase operational efficiency can be assured marked improvement. This planning kit, which uses the Primaris Healthcare Improvement Model, will help you think through the steps you'll need to take to design and implement programs that will enable efficiencies and enhance revenue across your healthcare system. But first, an overview:

Operational Efficiency Planning Kit

This planning kit was designed to help healthcare organizations begin designing effective care coordination programs. Complete the worksheets provided and you'll have the information you need to transform care coordination for your organization.

Thresholds for Success					
Step	Description	Clarify Current State	Desired Future State	Resources Assigned	Timeline
Chart Abstraction	Analyze information contained in the medical record and look for quality indicators that have been defined by best practice standards and/or quality measures. The information is recorded, benchmarked and analyzed for performance improvement.	<ul style="list-style-type: none"> <input type="checkbox"/> We are still working in a paper-based environment and need to begin transitioning to electronic health records. <input type="checkbox"/> We are working in a hybrid paper/electronic environment as we transition our patient data to electronic health records. <input type="checkbox"/> All of our patient data is electronic health records – we are no longer using paper charts. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Coding Review	Review current coding practices to see where improvements could be made to the efficiency and effectiveness of the documentation process.	<ul style="list-style-type: none"> <input type="checkbox"/> We have not recently reviewed our coding practices. <input type="checkbox"/> We are currently reviewing our existing coding practices and identifying opportunities for improvements. <input type="checkbox"/> We have reviewed our existing coding practices and identified opportunities for improvements. We are ready to implement these improvements. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Financial Assessment	Evaluate business, projects, budgets or other finance-related entities to assess current state and identify potential areas of waste.	<ul style="list-style-type: none"> <input type="checkbox"/> We have not done a thorough financial assessment to identify areas of waste. <input type="checkbox"/> We are currently doing an evaluation to identify potential areas of waste. <input type="checkbox"/> We have completed a financial assessment and identified areas of waste. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Focus Groups and/or Patient Surveys	Through interviews, focus groups and/or patient surveys, Primaris will gather feedback from patients, providers, or partners about the services and process that add value to your health system.	<ul style="list-style-type: none"> <input type="checkbox"/> We have not gathered feedback from patients, providers, or partners about the quality and value of the services provided. <input type="checkbox"/> We are currently gathering feedback from patients, providers, or partners about the quality and value of services provided. <input type="checkbox"/> We have gathered and analyzed feedback from patients, providers, or partners about the quality and value services provided. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

<p>Data Analysis</p>	<p>Summarize data from audits, coding reviews, assessments and focus groups into useful, actionable information that can be used to increase revenue, cut costs, and improve outcomes.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> We have not summarized data collected into useful, actionable information that can be used to increase revenue, cut costs, and improve outcomes. <input type="checkbox"/> We are summarizing data collected into useful, actionable information that can be used to increase revenue, cut costs, and improve outcomes. <input type="checkbox"/> We have summarized data collected into useful, actionable information that can be used to increase revenue, cut costs, and improve outcomes. 	<p>INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific</p>	<p>LIST RESOURCE(S) ASSIGNED: Be specific</p>	<p>START DATE: Insert date</p> <p>COMPLETION DEADLINE: Insert date</p>
<p>Thresholds Report</p>	<p>Prepare a detailed report that identifies the success thresholds for operational efficiency, level of improvement required, recommendations for improvements, including budget impact.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> We have not prepared a detailed Thresholds Report with recommendations for operational efficiency improvements, including budget impact. <input type="checkbox"/> We are preparing a detailed Thresholds Report with recommendations for operational efficiency improvements, including budget impact. <input type="checkbox"/> We have prepared a detailed Thresholds Report with recommendations for operational efficiency, including budget impact. 	<p>INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific</p>	<p>LIST RESOURCE(S) ASSIGNED: Be specific</p>	<p>START DATE: Insert date</p> <p>COMPLETION DEADLINE: Insert date</p>

Improvement Strategies					
Step	Description	Clarify Current State	Desired Future State	Resources Assigned	Timeline
Root Cause Analysis	Primaris will conduct a root cause analysis designed to identify areas of waste around staffing and patients. Because Primaris focuses on identifying processes that can be redesigned to increase operational efficiency, a root cause analysis allows you to make program decisions based on collected data and facts.	<input type="checkbox"/> We have not conducted a root cause analysis. <input type="checkbox"/> We are conducting a root cause analysis. <input type="checkbox"/> We have conducted a root cause analysis and have identified processes that can be redesigned.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Clinical Workflow Analysis	Determine clinical workflow, identify the most vital processes and address inefficiencies.	<input type="checkbox"/> We have not determined clinical workflow, nor have we identified the most vital processes and addressed inefficiencies. <input type="checkbox"/> We are determining clinical workflow, identifying the most vital processes and addressing inefficiencies. <input type="checkbox"/> We have determined clinical workflow, identified the most vital processes, addressed inefficiencies and created custom workflow checklists to optimize the delivery of care within our organization and across our network of partners.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Gap Analysis	Review your organization's objectives and conduct a readiness assessment and gap analysis to determine whether the workflows support the data that needs to be collected, how the data will be reported, and whether your organization's process, procedures, staffing and technology is optimized to achieve business objectives.	<input type="checkbox"/> We have not conducted a gap analysis. <input type="checkbox"/> We are conducting a gap analysis. <input type="checkbox"/> We have conducted a gap analysis.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Technology Considerations	Assess your existing technologies and identify areas where existing technology investments can be maximized to reduce inefficiencies and streamline clinical and business processes. Identify opportunities where further automation can deliver substantial improvements in patient care while reducing costs for your organization.	<input type="checkbox"/> We have not assessed our existing technology infrastructure. <input type="checkbox"/> We are assessing our existing technology infrastructure. <input type="checkbox"/> We have assessed our existing technology infrastructure.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Patient Engagement Strategy	Develop a patient engagement strategy focused on activating patients to collaborate with providers to manage health outcomes. Patient engagement may take the form of automated preventive service reminders delivered via email, or high-touch care management in the patient's home, and/or in-person goal setting with the doctor.	<input type="checkbox"/> We have the capabilities in-house to develop and implement a patient engagement strategy. <input type="checkbox"/> I don't know if we have the capabilities in-house to develop and implement a patient engagement strategy. <input type="checkbox"/> We do not have the capabilities in-house to develop and implement a patient engagement strategy.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

Change Management Plan	Develop a change management plan that includes educating providers and other staff members about the need for operational efficiency.	<input type="checkbox"/> We have not developed a change management plan for operational efficiency. <input type="checkbox"/> We are developing a change management plan for operational efficiency. <input type="checkbox"/> We have developed a change management plan for operational efficiency.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Quality Improvement Plan	Identify processes and outcomes of care that can be improved. Calculate total cost of care and identify potential savings resulting from achieving quality and performance improvement goals. Implement quality assurance and quality control processes that provide structured mechanisms for ongoing improvement.	<input type="checkbox"/> We have not developed a quality improvement plan. <input type="checkbox"/> We are developing a quality improvement plan. <input type="checkbox"/> We have developed a quality improvement plan.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Patient Experience Design	Improve the patient experience by designing smooth transitions between the patient, health care team, and the patient's medical neighborhood.	<input type="checkbox"/> We have not redesigned and improved the patient experience. <input type="checkbox"/> We are redesigning and improving the patient experience. <input type="checkbox"/> We have redesigned and improved the patient experience.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Process Review, Alignment and Standardization	From admissions to diagnostics to patient care to discharge planning to readmissions, analyze and identify process, patient-flow and clinical workflow issues. Assess opportunities to change workflows to generate long-term process and patient flow improvements.	<input type="checkbox"/> We have not analyzed and identified process and patient-flow issues. <input type="checkbox"/> We are analyzing and identifying process and patient-flow issues. <input type="checkbox"/> We have analyzed and identified process and patient-flow issues.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Financial Plan	Develop a financial plan that estimates revenues, expenses, and profits (or losses) for operational improvements. The financial plan should be reflective of services that can be strengthened and maintained, and those that can be reimbursed.	<input type="checkbox"/> We have not developed a financial plan for our operational improvements. <input type="checkbox"/> We are developing a financial plan for our operational improvements. <input type="checkbox"/> We have developed a financial plan for our operational improvements.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

Measures for Goal Attainment					
Step	Description	Clarify Current State	Desired Future State	Resources Assigned	Timeline
Goal Statement	Create a well-defined purpose that is real, practical and shared. The goal statement should summarize the improvement you think can be made within a realistic timeframe.	<input type="checkbox"/> We have not created a goal statement. <input type="checkbox"/> We are creating a goal statement. <input type="checkbox"/> We have created a goal statement.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Multi-Year Goal Setting	Identify and commit to achieving specific, measurable goals. Set multi-year goals that will enable your organization to drive incremental improvement over time to achieve all success thresholds.	<input type="checkbox"/> We have not identified and committed to achieving specific, measurable goals. <input type="checkbox"/> We are identifying specific, measurable goals. <input type="checkbox"/> We have identified and committed to achieving specific, measurable goals.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Timeline Planning	Create a detailed timeline that maps to your organization's care coordination goals and program requirements.	<input type="checkbox"/> We have not created a detailed timeline <input type="checkbox"/> We are creating a detailed timeline <input type="checkbox"/> We have created a detailed timeline	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Resource Planning	Identify resources across the organization required to increase operational efficiency.	<input type="checkbox"/> We have not conducted resource planning for operational efficiency. <input type="checkbox"/> We are conducting resource planning for operational efficiency. <input type="checkbox"/> We have conducted resource planning for operational efficiency.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Budget Planning	Determine estimated revenues and expenses. Look at line items such as physician billing, staff salaries, supplies, patient education materials, medical supplies, office space, technology and more to ensure you're looking at the total budgetary impact to your organization.	<input type="checkbox"/> We have not conducted budget planning for operational efficiency. <input type="checkbox"/> We are conducting budget planning for operational efficiency. <input type="checkbox"/> We have conducted budget planning for operational efficiency.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Prioritization	Once you have identified gaps, focus attention first on the improvements that will substantially improve operational efficiency. From forging partnerships and adopting health information technology to accelerating adoption of culture change strategies, establish short- and long-term priorities that will enable you to achieve your goals.	<input type="checkbox"/> We have not identified gaps and prioritized improvements. <input type="checkbox"/> We are identifying gaps and prioritizing improvements. <input type="checkbox"/> We have identified gaps and prioritized improvements.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Action Plan	Develop an action plan that includes a set of recommendations about how to put recommended strategies in place.	<input type="checkbox"/> We have not developed an operational efficiency action plan. <input type="checkbox"/> We are developing an operational efficiency action plan. <input type="checkbox"/> We have developed an operational efficiency action plan.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

Goal Setting Across Continuum of Care	Facilitate goal setting across the continuum of care by bringing together various care providers to determine what the goals are, how they should be set, and how they should be measured.	<input type="checkbox"/> We have not facilitated goal setting across the continuum of care. <input type="checkbox"/> We are facilitating goal setting across the continuum of care. <input type="checkbox"/> We have facilitated goal setting across the continuum of care.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Goal-to-Actual Reporting	Once you've established specific goals and desired results, implement a process for tracking your actual results and comparing the actual results to the desired results.	<input type="checkbox"/> We have not implemented a process for tracking our results and comparing the actual results to the desired results. <input type="checkbox"/> We are implementing a process for tracking our results and comparing the actual results to the desired results. <input type="checkbox"/> We have implemented a process for tracking our results and comparing the actual results to the desired results.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

Execution and Evaluation

Step	Description	Clarify Current State	Desired Future State	Resources Assigned	Timeline
Strategy Implementation and Execution	Take your plan from paper to day-to-day operation. Implement changes in the delivery system required to achieve seamless care and the efficiency you seek. Strengthen the primary care team and develop multidisciplinary teams that can oversee the care of people over time. Track progress with comparative information and performance benchmarking.	<ul style="list-style-type: none"> <input type="checkbox"/> We are still in the planning stages, and are not ready to implement our operational efficiency strategy. <input type="checkbox"/> We are ready to begin implementing our operational efficiency strategy. <input type="checkbox"/> We are implementing our operational efficiency strategy. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Project Management	Assign a resource to manage and keep your projects moving forward to meet expected results in a timely, cost-effective manner.	<ul style="list-style-type: none"> <input type="checkbox"/> We do not have a resource to manage our project. <input type="checkbox"/> I don't know if we have a resource to manage our implementation project. <input type="checkbox"/> We have assigned a resource to manage our implementation project. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Pilot Projects	Use the Plan-Do-Study-Act cycle to guide pilot implementation efforts for your operational efficiency efforts.	<ul style="list-style-type: none"> <input type="checkbox"/> We have not conducted a pilot. <input type="checkbox"/> We are conducting a pilot. <input type="checkbox"/> We have conducted a pilot and are ready for full implementation. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Clinical Documentation Improvement	Clinicians generally are not using EHRs to their full capacity to coordinate care. Determine how to best improve data collection processes and workflows to improve clinical documentation and, as a result, increase operational efficiency.	<ul style="list-style-type: none"> <input type="checkbox"/> We have not determined how to best improve data collection processes and workflows to improve clinical documentation. <input type="checkbox"/> We are determining how to best improve data collection processes and workflows to improve clinical documentation. <input type="checkbox"/> We have determined how to best improve data collection processes and workflows to improve clinical documentation. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Policies and Procedures	Ensure your organization has structured and effective systems, policies, procedures, and practices to maintain operational efficiencies. Audit and revise your existing policies and procedures.	<ul style="list-style-type: none"> <input type="checkbox"/> We have not audited and revised our existing policies and procedures. <input type="checkbox"/> We are auditing and revising our existing policies and procedures. <input type="checkbox"/> We have audited and revised our existing policies and procedures. 	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

Process Mapping	Use process mapping to illustrate current bottlenecks in staffing, technology and layout, identify existing barriers, and highlight potential areas for quality improvement.	<input type="checkbox"/> We have not used process mapping to identify existing barriers. <input type="checkbox"/> We are using process mapping to identify existing barriers. <input type="checkbox"/> We have used process mapping to identify existing barriers.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Staff Training and Education	Facilitate training sessions for staff to focus on competencies and training requirements for efficient operations.	<input type="checkbox"/> We have the capabilities in-house to facilitate training sessions. <input type="checkbox"/> I don't know if we have the capabilities in-house to facilitate training sessions. <input type="checkbox"/> We do not have the capabilities in-house to facilitate training sessions.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Team Development	Form a strong team. Ensure your team members can identify key components of an efficient operation model that can be implemented in your practice setting.	<input type="checkbox"/> We have the capabilities in-house to develop strong teams. <input type="checkbox"/> I don't know if we have the capabilities in-house to develop strong teams. <input type="checkbox"/> We do not have the capabilities in-house to develop strong teams.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date
Just-in-Time Analysis and Reporting	Create the structure, process, and outcome measures required to assess progress toward your goals, while enabling you to evaluate access, continuity, communication, and tracking of patients across providers and settings. Analyze this measurement data to prepare just-in-time reports that will help you make timely, informed decisions.	<input type="checkbox"/> We have not created the structure, process, and outcome measures required to assess progress toward our goals. <input type="checkbox"/> We are creating the structure, process, and outcome measures required to assess progress toward our goals. <input type="checkbox"/> We have created the structure, process, and outcome measures required to assess progress toward our goals.	INSERT DESCRIPTION OF YOUR DESIRED FUTURE STATE Be specific	LIST RESOURCE(S) ASSIGNED: Be specific	START DATE: Insert date COMPLETION DEADLINE: Insert date

It's TIME to Improve Operational Efficiency

We hope you find this planning kit helpful. For more information download our [Operational Efficiency Solution Sheet](#). If you're seeking a partner to help you, [request a free Primaris consultation today](#).