# Building an Epic Team

An Insider's Guide to Recruiting, Hiring and Retaining Epic-Skilled IT Professionals

healthcare **ITleaders**

# A Note from Our Managing Principal

**The decision to buy and implement the Epic Systems electronic health record (EHR) is typically one of the largest strategic investments your hospital or health system will make.**

In addition to software costs, you are committing to long-term and equally critical investments in the people who will build and run the system.

With Epic at the center of your patient care strategy, you will want to hire the best and brightest Epic-skilled talent you can find. But here's the problem: so does every other hospital in the country with an Epic EHR.

As David Keith Butler, MD, VP, Epic Optimization, Sutter Health told us: "I don't think we've ever had to compete this hard in the history of healthcare for talented IT resources."

A large-scale implementation requires hundreds of highly-skilled IT professionals and you will need these individuals years after launch to maintain, upgrade and optimize your system. But where do you find them? How much should you pay them? And how do you retain the best Epic talent for the long haul?

We tried to answer these questions and more in our guide. To do so, we're drawing on our own experience, as one of the nation's leading health IT consulting and staffing firms, as well as the expertise of senior healthcare executives who have built their own high-performing Epic teams.

Healthcare IT hasn't had a playbook for hiring on this scale in such a competitive talent market—until now. We hope our guide proves valuable for you in your own Epic hiring journey.

*Bob Bailey*

**Bob Bailey**
Managing Principal, Healthcare IT Leaders

# Executive Summary

We asked experienced Epic hiring managers around the country for their best practices and 8 key themes emerged. Here's a brief overview of our findings and advice:

## ① Start with a plan and senior buy-in

Your internal hiring plan should be mapped to key implementation dates. Create a hiring team with representation from senior management, IT, HR and other departments (clinical, finance) involved with the Epic project.

## ② Create your ideal Epic org chart

Determine all of the contract and full-time roles required for your implementation and put them onto an org chart. Group the roles by key functions and highlight those that are a priority for project initiation.

## ③ Hire from inside—and outside

Many organizations fill up to half or more of their permanent Epic positions with internal hires who receive Epic training. Certified external hires are equally critical for their deep Epic knowledge and past implementation experience.

## ④ Publicity has recruiting benefits

Spreading the word about your project stimulates candidate interest. Highly publicized, desirable implementations attract skilled talent from across the country.

## ⑤ Embrace consultants

Most large-scale Epic projects rely, to some extent, on hourly contract consultants. They are quicker to onboard and provide a flexible bridge to permanent hires.

## ⑥ Don't skimp on pay and benefits

Competitive salaries are critical for attracting talent. Benchmark pay at other local Epic hospitals and use bonuses or other incentives as added sweeteners.

## ⑦ Interviewing must be efficient and organized

Efficient pre-screening and interviewing are keys to building a large team quickly. Internal stakeholders must block out time for interviewing to avoid becoming a bottleneck. Make decisive hiring decisions so top talent doesn't slip away.

## ⑧ Have a retention plan or lose your top talent

Hiring without a strategy to keep your employees engaged for the long haul is shortsighted. Keep employees loyal with a multi-pronged retention plan that addresses financial need, lifestyle and career goals.

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# 01 Define Your Hiring Team and Plan

**Hiring for a large-scale Epic Systems electronic health records implementation may seem like a daunting task. It helps to start with a plan.**

Just like the implementation itself, the rapid hiring of an Epic team is a major project that should have executive sponsors, a senior leadership team to make key decisions, and a detailed project plan complete with milestones and deadlines. Many hospitals actually hire or assign a project manager dedicated exclusively to the hiring plan.

The size and makeup of your internal Epic hiring team is up to you, and will vary by institution, but should include representation from the C-suite, senior IT and HR leaders, and other key departments (clinical/financial) involved in the project. The CEO and CFO sign off on the hiring plan and budget. They may also need to approve any new senior hires required for the implementation itself. IT should be represented by the CIO, head of IT, or the leader of your Epic project. A Chief People Officer or VP of HR also plays a key role as your internal expert on hiring, organizational structure and compensation.

Your plan should outline and assign the key tasks for hiring including finalizing job descriptions and salary bands, interview procedures, talent evaluation, and requirements for offers and onboarding. Important hiring deadlines should also be documented, so that key personnel are in place and trained as needed to propel the implementation forward.

If you're working with one or more staffing firms to support your efforts, integrate them into your planning early in the process, and make sure they have the requisite information they need (start dates, pay rates, etc) to be successful.

## INSIDER TIP

Plan regularly scheduled meetings to update key stakeholders on the hiring plan. Regular meetings allow you to report on progress toward hiring goals, to troubleshoot concerns, and provide a forum for discussion on the merits of individual candidates.

# Hire the Right Leader

The leadership of your Epic program is the most important role that you will hire. It's not for the faint of heart. This individual must have the right soft skills as well as the experience level and broad knowledge base required for success. They have to be able to partner with the right people and drive to the Go Live.

*Sue Schade*
*Interim CIO, University Hospitals*
*Founding Advisor, Next Wave Health Advisors*

# 02 Build Your Epic Org Chart

**Your approved hiring plan and budget should presume a certain headcount based on how many contractors and full-time employees the Epic project will need during the implementation phases, and who will stay on after the project is live.**

How many hires you need to make and how quickly will depend on the size of your Epic project and the timing of the roll-out, further highlighting the importance of the hiring team working in lockstep with the implementation team.

To the extent possible, define each Epic role that you plan to hire by job title with a job description and salary band. Determine which roles require FTEs and which can be filled by contractors, and then build organizational charts grouped by major functions, most of which fall into five key areas.

### Project Management
Program or project managers who manage individual projects within the larger Epic implementation.

### Application Management
Analysts, Builders and Developers who design, implement and maintain Epic interfaces and applications. Groups of analysts working on related applications may roll up to a Senior Analyst or Application Coordinator.

### Training
Trainers help internal end-users understand how the software works, how to use it and how it interoperates with other health IT software. The training group often includes Instructional Designers experienced in creating and maintaining training curriculum.

### Reporting and Analytics
Business analysts, report writers and data modeling experts who extract and make sense of EMR data for clinical and business users.

### Infrastructure Management
IT specialists and admins skilled in the setup and maintenance of the infrastructure—servers, databases, networks, firewalls—required to securely and efficiently run the Epic applications.

Other common Epic hiring needs include help desk, test/QA and legacy support roles. There are non-technical needs as well, for example, administrative or recruiting support to process a large volume of applicants. Some hospitals add marketing personnel to build an internal communications strategy around their Epic program.

**INSIDER TIP**

Hiring for all of your anticipated Epic roles at once is unfeasible and unnecessary. Instead, prioritize recruitment to align with the implementation timeline. Analyst hiring should be prioritized based on the rollout schedule for different modules, while training resources may not be a first priority. Use consultants to move the build forward while permanent resources are trained or hired.

# Recruit the Ninjas

Every Epic analyst isn't created equal. You may see an analyst who has only worked for one company for a few years and they've only done one thing. Compare them to an analyst who has worked on three or four projects and has multiple certifications and has done a plethora of things with the software. Those are the people I am trying to recruit. I want the Ninjas.

*David Keith Butler, MD*

*VP, Epic Optimization, Sutter Health*

# 03 Promoting from Within

**With an idea of how many roles you'll need, determine who's already in your organization that can fill some of those roles. Candidates to consider include:**

- In-house IT staff devoted to your current/legacy systems
- Clinical staff with an interest or previous background in IT
- Staff with past Epic experience
- EMR super-users interested in training careers
- Project Managers with PMP certification
- Subject Matter Experts who understand departmental workflows

Many in your hospital will view the Epic project as a chance to advance their careers, so you'll have plenty of internal applicants to choose from. Make sure you've outlined a vetting process that offers your employees transparency and equal consideration and makes them feel good about your organization even if they are not selected for the team.

"It helps to have HR manage this process and drive messaging," says Charles Podesta, CIO, UC Irvine. "We wanted our staff to feel that the process was fair and that IS (Information Systems) wasn't just picking their favorites."

## Training by Epic

Epic offers its clients support for employee selection, including a skills assessment test that should be passed as a prerequisite to move forward in certification training. Training is paid for by the employer and typically begins with classroom time at Epic headquarters in Verona, Wisc.

As the sole-source provider of certifications for its software, Epic sets all the schedules for training. Your internal hiring plan must be architected with Epic's certification schedule in mind, so that your staff has time to be adequately trained to take their place on the implementation team.

## Internal v External

Current employees are a valuable, local talent pool and placing them on the Epic team turns them into internal champions for the project, which is critical for change management and long-term success.

But be cautious about overreliance on internal talent. The learning curve for Epic is steep and some employees may not make it through the certification process. Those that do will still be novices who will likely need much more time and support than highly-experienced Epic resources.

As one hiring manager told us, "It's noble to hire from within. But if you can hire externally, and get seasoned implementation resources who have done this before on a similar project, you may get more bang for your buck."

**EXPERT ADVICE**

# Plan Beyond Implementation

Some hospitals fall down after their Go Live because they want to cut costs. Start having conversations with your leadership on what your post-live support model will look like after the implementation. It's never too early to begin defining the resources and budget you need to make that successful.

*Charles Podesta*

*CIO, UC Irvine Health*

# 04  Get the Word Out

**News of a new Epic client or implementation travels quickly on the HIT grapevine. So one of the quickest and simplest ways to attract prospective candidates is to announce publically that you are implementing Epic and hiring to support the project.**

Publicity-shy Epic doesn't make these announcements, but the news will eventually come out, so why not get out in front of it—for example, with a press release—and use it to your advantage in recruiting. We're aware of one Epic client that received over 300 quality resumes within weeks of publically announcing their Epic contract.

Going public will draw inquiries from Epic-skilled personnel at other nearby hospitals. While there are obvious benefits to recruiting local talent (no relocation costs), you must be aware of Epic rules and non-compete clauses that would prohibit an individual from leaving their employer or a current implementation. According to Sue Schade, interim CIO, University Hospitals, "You never want to raid another (Epic) shop."

## Communication Strategies

Some additional strategies to attract candidates, internal and external include:

- Post job openings with complete descriptions as soon as possible to your website's career page and external job boards, and have systems in place to manage and respond to submissions

- Brand a public-facing web page with information on the Epic project, including key milestones, answers to frequently answered questions, and links to employment information

- Leverage internal communications programs, such as employee newsletters, intranets and town hall meetings

- Become active in the Epic User Group for your state and local HIMSS chapter

- Incent employees to recommend qualified referrals

# 05 Using Contractors

**Most large-scale Epic projects inevitably rely on contract talent to supplement the permanent team and with good reason. Benefits of hourly consultants include:**

**Experience.** Epic contractors with deep experience gained on multiple full-lifecycle implementations are strong additions to any project. Their extensive knowledge of the software, combined with a familiarity with complex projects similar to yours, is invaluable.

**Speed.** Contract consultants can typically hit the ground running and get key elements of your project moving forward in parallel with your permanent hiring efforts and the ongoing training of your internal staff. Consultants are also a relatively quick hire for unanticipated needs or roles that arise once the project has started.

**Flexibility.** Many hospitals leverage contractors for project roles that are short-term in duration (for example, Go-Live support) or won't extend beyond the life of the project. Saying goodbye to contractors when their work is done can be less expensive than long-term commitments to full-time employees.

Presuming your budget and hiring plan call for hourly contractors, there are a variety of ways to bring on consulting talent. In our experience, institutions may choose one, two or all three of the options below depending on the size of their project, and their experience and comfort with outsourcing.

- Internal recruiters: The IT recruiters in your organization should have a strong knowledge of your needs and may have past experience with Epic consultants

- Systems integrators or consulting firms: When a firm like Deloitte or Accenture is leading your implementation, they will source and bring their own consulting talent to the project. You may choose to supplement their resources using Staffing Firm contractors.

- Staffing firms: Experienced Epic staffers like Healthcare IT Leaders maintain an active, vetted database of Epic consultants and potential full-time hires, including builders and analysts, PMs, data specialists and trainers/instructional designers across every Epic module and related technologies.

**INSIDER TIP**

If you decide to work with one or multiple staffing firms, make sure they have the depth and breadth to support your entire project (including non-Epic IT roles). The Epic market is a unique recruiting niche requiring national candidate reach and specialized technical knowledge. Quality firms should be able to provide past Epic reference clients that you can speak with.

It's fine to use an RFP process or ask for rate cards (a range of hourly bill rates by position) as an initial screen of prospective firms. But don't choose a staffer by cost alone. Demand for Epic talent has driven hourly rates higher and your outsourcing partners should have some flexibility, within your budget guidelines, to source the best talent for your project.

# Dedicate Hiring Resources

Having a full-time, dedicated HR recruiter is so beneficial in managing the sheer volume of applicants and activity. We outsourced some of our recruiting, but even managing those vendors is a full time job. Sorting through resumes and making package and salary decisions is a tremendous amount of work. Hospitals can underestimate the amount of time it takes to mount a quality recruiting effort.

*Jamie Nelson*
*CIO, Hospital for Special Surgery*

# Setting Salary Bands and Pay Rates

**Epic-skilled full-time employees and hourly contractors are in high demand, and their salaries and rates will depend on a variety of factors including:**

- Total years of technical and supervisory experience

- Total number of Epic certifications—and the recency of the certifications

- Total number of full-lifecycle implementations completed

- Education and related clinical experience

- Demand/supply for a specific Epic skillset

Beyond those factors, institutions must take their own competitive and geographic variables into account. Expect to pay more in regions where multiple Epic institutions are in competition for the same talent pool.

Your organization's existing IT salary bands should provide a reasonable starting point for setting Epic salaries, but be ready to adjust your bands or pay at the top of your salary ranges to attract experienced Epic professionals. Some Epic roles also require a combination of multiple skills, e.g. IT and finance or clinical skills, so those individuals may need to be comped in a different way.

For benchmarking, spot check salaries at other Epic hospitals in your area to ensure you are being competitive. You can purchase a national Epic salary survey, if desired, (Google: "Epic Salary Survey") but staffing firms that do a lot of permanent placement around the country should also be able to give you data on current compensation for most Epic roles.

Additional financial incentives are common in the Epic market and can be used to sweeten offers to candidates without breaking your salary bands. These can include sign-on bonuses, relocation packages and retention bonuses. Once the project is underway, bonuses for achieving certain project milestones can also be used as incentives.

### Contract Rates

Hourly consulting bill rates can range widely depending on the role, the experience required and the terms you've agreed to with your staffing or consulting partners.

# From Interview to Offer

**When building any large team, and in particular an Epic team, the keyword for success is "efficiency." Here are tips to make the process go as smoothly as possible.**

## Prescreen

Using your job descriptions as a guide, determine the minimum experience, education and certifications you want for each position, and then sort candidates into groups: Those you definitely want to interview, those that meet some but not all of your requirements and those that do not meet your minimum requirements.

Conduct initial phone screens to determine suitability and learn how well candidates communicate. Listen for job, location, salary or rate expectations, and let candidates know about next steps.

## Interview

Decide who in your organization must interview candidates and block out their time. Don't let the availability (or lack thereof) of any one individual become a bottleneck. Also, make sure interviewers are sufficiently prepared with screening questions that fairly assess technical and soft skills as well as cultural and project fit.

One-on-one interviews are ideal, but not always efficient. Panel interviews let multiple stakeholders ask questions (and hear the answers) at the same time. Panels also let candidates show how they respond in a group environment. If you're using technology to enable interviews, such as Skype or GoToMeeting, test it in advance to work out any glitches. Interviews should have a time and/or question limit, and make sure candidates for the same position are being asked the same questions or are being challenged to solve the same problems.

## Assess

Move especially quickly in this stage, as the Epic market also moves quickly, and you don't want to lose top-notch candidates. Gather hiring stakeholders, ask for gut reactions and compare notes. If there are outstanding questions or concerns, ask the recruiter to go back to the candidate for additional information or clarification. For candidates that will require credentialing/certification, assess your own confidence level on their ability to complete the requisite training.

## Offer

Once you've reached a decision, and after reference checks are complete, have recruiters extend verbal offers to your selected candidates, followed by a written offer letter. Contractors will receive a copy of a contract from their staffing firm, explaining the length of the project, job expectations, rate, payment information and legal details.

Set an expiration date for your offers. You need to know as soon as possible whether a candidate plans to accept. And don't let offers become protracted negotiations. If you have done your vetting properly, you should have a good idea of what terms a candidate is ready and willing to accept.

# Monitor Vacancy Rates

We are always looking at our vacancies. When a vacancy reaches a near-critical status, I want to know why and what are our action steps to create candidate pipeline and fill the position. Why? Because it could affect the rollout of a particular phase in Epic.

*Veronica Zaman*
*Corporate Vice President, Human Resources and Learning, Scripps Health*

# Strategies for Tough-to-Fill Roles

**Some Epic roles are hard to fill. If the module is new or uncommon, the skilled talent pool may be limited. Or you may require a unique combination of skills and certifications that are hard to find in a single individual. You may feel like you're searching for a unicorn, but our experts say there are ways to find good candidates for almost any position.**

**INSIDER TIP**

As of 2016, hiring managers may face a constrained talent market when searching for qualified analysts to support these Epic modules: Beacon (Oncology), Beaker (Lab), Cupid (Cardiovascular), Healthy Planet (Pop Health), Home Health (Remote access for Home Health suppliers), Radiant (Radiology), and Tapestry (Managed Care). Specialized expertise *within* these modules may be even more challenging, for example, finding a Beaker analyst experienced with Reference Lab Billing.

**Review your "maybes."** Remember that "maybe" pile of resumes you created when you were prescreening Epic candidates during the interview process? Look back through it to see if you can find a fit for one of your needs with a certification or additional reference.

**Consider similar experience.** Jamie Nelson, CIO, Hospital for Special Surgery, explains, "If someone applied for one position but was a better fit for another position, we would move the resume internally. We'd say 'Look this person applied for Ambulatory, but they have a lot of Registry experience and we really need someone to do Registry.'"

**Up your offer.** People with in-demand skill sets know they're in demand, and for them to accept a tough-to-fill role somewhere new, they might need additional perks. See if you can beat their current salary, location or benefits to get them to say yes.

**Coax an internal candidate.** Some of your employees may have been reluctant to put themselves forward initially for fear of putting their current role at risk. Give them confidence that you'll support their transition and training as well as assurances that they won't lose their place in the organization.

# Long-Term Retention

**Now that you've found, built and trained your Epic team, keep them. Your best and brightest will be bombarded with job offers daily, so you have a vested interest in keeping them happy and engaged for the long haul. Here's how to do it.**

**Offer fair market value salaries.** At least annually, if not more frequently, check everyone's salaries to make sure you're not paying last year's rate. Organizations that keep pace with the compensation trends in their industry are also, not surprisingly, leaders in retention, according to benefits advisory firm, Towers-Perrin.

**Offer retention bonuses.** Rewards for loyalty speak volumes. Offer retention bonuses if your hospital goes through a merger, around the most critical times of your Epic implementation or right after a go-live, when professional eyes can start to wander.

**Provide training opportunities.** Sending team members for additional Epic certifications shows a good-faith investment in their future. Cross-training also reduces risk for the institution, says Sue Schade, Interim CIO, University Hospitals, "so you don't become reliant on one or two individuals for their knowledge of a certain module."

**Support work-life balance.** Surveys consistently show that work-from-home opportunities are important to IT workers. Jamie Nelson, CIO, Hospital of Special Surgery says, "Think of your employees' needs as well as your own. You have to up your game in this competitive market and be flexible for people who could work remotely or at home."

**Promote your stars.** To keep top-performers, offer promotions that allow them to manage more people or more technology. Or acknowledge their performance by adding them to special teams or new projects to keep them engaged and encourage innovation.

**Improve your hospital or department's reputation.** If you are consistently losing talent, you may have a reputation problem—either on your project or as an institution. Exit interviews, anonymous surveys, or even reputational websites, like GlassDoor, can help you identify root issues that need to be addressed.

**INSIDER TIP**

Most of your hires will naturally want to know what lies in store for them after the initial Epic implementation. Your ability to present a long-term view of their career path in your IT organization is critical. David Keith Butler, MD, VP Epic Optimization, Sutter Health advises: "Explain your vision and your strategy beyond the implementation, so employees can buy into it and envision themselves as being part of that change."

# Epic Hiring Journey: How Scripps Health Did It

**Scripps Health has proven up to challenge of building a large-scale Epic team for its ongoing, multi-year implementation. Faced with an aggressive start date, Veronica Zaman, Corporate Vice President, Human Resources and Learning, along with the rest of the Scripps Health leadership team, built a hiring plan to bring on 150 permanent and contract resources in three months. With Scripps' first phase of hiring now complete, we share some of Veronica's best advice and experience.**

## Prioritizing Key Hires

"We met with our Epic steering committee and we went line by line through the labor resources they needed and categorized those based on skillsets. We also identified the roles that we absolutely had to have within a 60- or 90-day time period versus those where we might have a little more flexibility in terms of time to hire."

## Hiring a Supplemental Staffing Agency

"Because we did not have (Epic) expertise in our own recruitment environment we created an RFP that went out to a select group of vendors. We asked them to explain how they could serve us initially, as a sole source vendor, to fill our immediate and highly specialized needs, but also over the long term, as one of multiple vendors, for the remainder of our three-year project. And that's how we came up with our vendor who we worked with during the first phase as a truly sole source."

## Assigning Dedicated Hiring Resources

"The Epic project has its own service line resources to manage recruitment and hiring so that it doesn't get mixed into our normal day-to-day business. We felt very strongly that we didn't want to dilute the recruitment effort that it takes to deliver patient care and run a hospital by throwing on top of that something that was time-sensitive, that required some unique skills, and that had a specific dollar impact on our organization if we weren't able to meet certain hiring deadlines."

# Epic Hiring Journey: How Scripps Health Did It

## Prepping Interview Panels

"We identified specific people we needed on each panel and calendared their time in advance. We worked on coaching so that everyone on a panel was trained on the specific attributes and skills we were seeking. And we also rely a great deal on candidate pre-assessment tools. We have a tool that we use for all of our prospective employees to measure certain behavioral characteristics. We also use, for certain roles, an online tool that measures critical thinking skills and how an individual might handle certain team interactions. So when the panels came together they already had a strong profile of who they were going to be interviewing and an individual's strengths and weaknesses."

## Maintaining the Current IT Group

"We knew we would have two systems to run throughout the project, our current system and the Epic system. We mapped out a process for determining what percentage of our IT folks would want to go forward and become Epic certified, and we invested in them. And we also knew some would not want to go that route and we've been very supportive of them. We've had very little turnover in the people who did not want to go with Epic. They are really invested in keeping the legacy system whole. And we pay as much attention to them as we do to the Epic people."

## Engaging the Organization

"Hiring on this scale takes stakeholders from all parts of the system coming together. It's not a one or two person thing, it's an organizational effort. If you think of this solely as an IT exercise or an HR exercise, you are going to be behind the eight ball. Because Epic is something that has an organizational impact. It changes how we are going to practice medicine and do business, and you've got to think it from that perspective."

# About Healthcare IT Leaders

**Healthcare IT Leaders** is a national leader in IT workforce solutions, connecting healthcare provider, payer and life sciences organizations with experienced technology talent for consulting and full-time hiring.

Primary areas of focus are EMR, ERP, CRM, HCM, BI, and QAT. Our consultants implement and optimize enterprise software solutions from leading vendors including Epic, Cerner, McKesson, AllScripts, Meditech, Salesforce, Lawson, PeopleSoft, SAP, Oracle, ServiceNow and more.

Based in Greater Atlanta, with offices in Boca Raton, Boston, Los Angeles, New York, Philadelphia and Phoenix, our company is the highest-ranking Health IT Services firm on the 2015 Inc. 5000. We have been named a Best Place to Work by the Atlanta Business Chronicle and Staffing Industry Associates.

## Seeking Epic Talent?

Let us know at **info@healthcareitleaders.com**

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See our report on **HIT Workforce Engagement Trends**

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