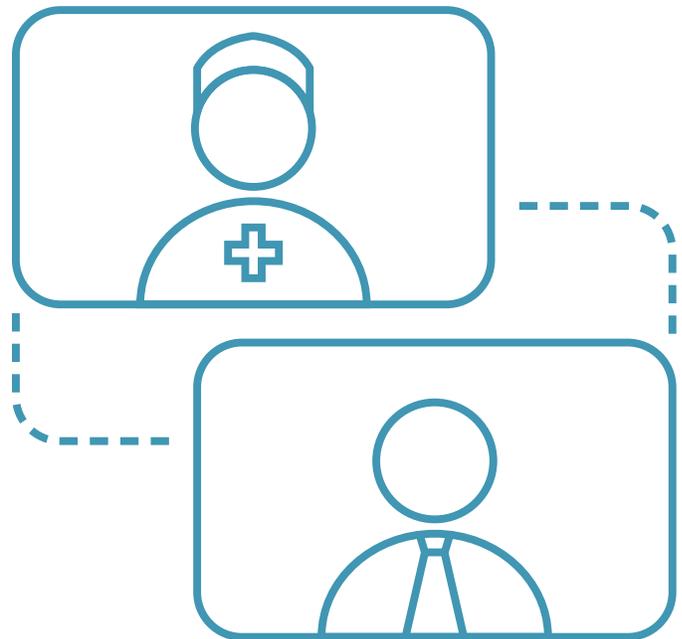# How to Design and Implement a Successful Telehealth Program for Your Organization

Nine Key Tactics

Introduction:
Toward a Telehealth Tipping Point

Telehealth has been on the healthcare horizon for so many years that its approach has seemed deceptively slow. That's about to change.

Driven forward by the rapidly evolving and relentless force of mobility and social media trends, telehealth is poised to transform healthcare in the same way that Airbnb transformed the lodging industry and Uber transformed ground transportation.

Other pent-up forces behind telehealth include looming physician shortages, insurance coverage expansion (associated with the US state and federal insurance exchanges) and increasing consumer demand for convenient care.

Shifts in reimbursement dynamics moving from volume-based to value-based reimbursement have added to the urgency to reduce costs and maximize operational efficiency. Telehealth programs provide a way to achieve both goals simultaneously.

Help Is on the Way

A restraining force on the adoption of telehealth has been the slowness of federal and state legislatures to pass reimbursement policies that give medical services delivered by telehealth parity with conventional care. Even that restraint is soon to be alleviated.

A Telehealth Rule Waiver posted on Centers for Medicare and Medicaid Services website (https://innovation.cms.gov/Files/x/nextgenaco-telehealthwaiver.pdf), for example, removes a longstanding limitation on telehealth in rural areas and opens the way for "Next Generation" Accountable Care Organizations (ACO) to open the flood gates to telehealth in patients' homes wherever they are. State legislatures are expected to follow suit and accelerate the trend toward reimbursement parity between telehealth and conventional medical services.

Tipping Point

As the forces behind telehealth continue to build and the obstacles in front of it are removed, healthcare organizations that are not prepared for the full force of the trend are at risk of being overwhelmed by telehealth when it arrives.

The time to prepare is now.

The Institute for Healthcare Improvement (IHI) has identified three key goals to optimize health systems' performance. Called the Triple AIM, they include:

1. Improving the patient experience of care
2. Improving the health of populations
3. Reducing the per-capita cost of healthcare

Telehealth has the potential to contribute significantly to each goal.

Triple AIM

1. Improving the patient experience of care

2. Improving the health of populations

3. Reducing the per-capita cost of healthcare

Population Health

Experience of Care   **Per Capita Cost**
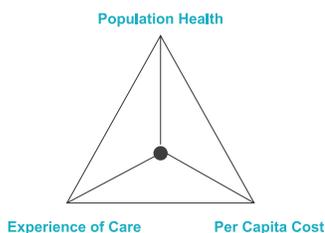
Telehealth is already approaching a tipping point when it will be such an integral part of the mainstream medical experience that there will be no difference between healthcare and telehealth; the words "telehealth" and "healthcare" will become synonymous.

The number of patients and clinicians who expect to have telehealth services available is rapidly approaching a critical mass beyond which having an established telehealth program will be a requirement for any mainstream healthcare organization. At that point, organizations that do not have a comprehensive telehealth strategy will be left behind. Clinicians will transition to organizations that provide telehealth, and patients will follow them.

The Telehealth Maturity Model

There are reasons why the healthcare industry has been conservative when it comes to the adoption of new technologies. The stakes are high and budgets are tight. Nevertheless, forward-looking healthcare organizations are enthusiastically embracing telehealth to enhance and extend the scope of patient care within their communities in a way that also supports their long-term business objectives and sustainability.

Adoption of telehealth has been varied across the healthcare industry and falls into three maturity levels. You don't necessarily have to proceed through each level in succession. The best way to progress along your own telehealth transformation journey, however, is to first understand where you are today.

Level one is an ad hoc telehealth solution often cobbled together to support the narrow, urgent need of a small group of clinicians and patients.

At this level of maturity, telehealth solutions tend to be implemented for, if not by, a specific department within a hospital, often funded with limited grant funding, and often outside the purview of the organization's IT department or the organization's administrative leadership. This may be the most exciting and honest form of telehealth as clinicians come up with a creative way to use telehealth to meet a specific need and go do it. These standalone solutions, however, are generally not scalable and not interoperable with other clinical and administrative systems. Most will eventually need a re-design to be integrated into other critical systems.

The drive to progress to level two usually comes when clinicians recognize the limits of their ad hoc solutions, want IT support and want to enhance their capabilities and integrate them with other departments to expand their usefulness and facilitate integrated workflow.

Level two involves a departmental telehealth strategy that is more rationalized, standardized and programmatic.

Telehealth solutions begin to proliferate at this level as clinicians in different departments find their own innovative ways to use the technology to meet their needs. Departmental or service-line leadership groups are also actively involved as stakeholders. This is also the level where the organization's administration realizes that not all of these new telehealth solutions meet the same quality and security standards or contribute quantifiably to the bottom line. Higher-level administrators typically begin to be more actively involved at this point, conducting assessments to identify all the instances of telehealth and beginning to establish some governance to rationalize and coordinate existing telehealth use.

Organizations are not ready to progress to level three until they fully understand where they are, can visualize where they want to be and develop a strategy to get there, progressing incrementally along a path that is aligned with their organization's long-term goals and objectives.

Adoption of telehealth has been varied across the healthcare industry and falls into three maturity levels.

Level three is a clinically-integrated, sustainable, program-based telehealth solution that enables advanced data exchange between healthcare providers, patients, labs, pharmacies and family caregivers.

Level three telehealth is a strategic initiative typically led or sponsored by a hospital or system-level VP or C-level executive and supported by a multidisciplinary telehealth team. Formal governance is common and handled by a governance committee. Standards and protocols are deployed, ensuring the integration of telehealth solutions in critical systems, including electronic health records (EHR), patient scheduling, billing, pharmacy and labs.

Telehealth solutions at this level are "programs," and are typically integrated into the organization's IT infrastructure, including data center, cloud and mobile environments. HIPAA and PCI compliance is enforced, data analytics is available and backup, business continuity and disaster recovery systems are in place.

Level three is also the point at which telehealth is truly transformational. At level three, telehealth is user-friendly and automated and able to leverage integrated electronic patient information. Ideally, the technology solution dissolves between the patient and the clinician, leaving telehealth the de facto model for patient interactions. "Telehealth" becomes known simply as "healthcare."

The Way Forward

There are many potential dead ends and pitfalls along the path to level three of the telehealth maturity model. The balance of this white paper presents nine key tactics that can be used as a road map to help you progress along your telehealth transformation journey skillfully and with confidence.

Wherever you are in the journey, the nine tactics presented here can be used to help you take a strategic approach to the design and implementation of a successful telehealth program for your organization.

Nine Key Tactics for Developing a Successful Telehealth Program

The following tactics will help you develop a successful, assessment-driven strategy whether you are developing a telehealth program for one service line or for your entire enterprise.

1. Build an effective governance model

Governance is a key factor in the success of an organizational initiative to establish an enduring telehealth program. An effective governance model will support the planning, implementation and ongoing activities necessary to begin and sustain the telehealth program. Governance will also be used to resolve differences, prioritize activities and advance the well-being of the telehealth program in line with the overall values of the healthcare organization.

The governance team should provide executive oversight to ensure alignment between related efforts and strategic guidance. Key responsibilities of the governance team are:

- Development of policy and procedure
- Organizational buy-in and alignment
- Prioritization of activities and projects
- Resolution of differences and obstacles
- Oversight of technology purchases

Providing effective governance builds confidence among users and management in the long-term success of the telehealth strategy.

2. Assemble multi-disciplinary telehealth teams

Depending on your organization, it may be necessary for each service line, or perhaps service offering, to have a focused telehealth team composed of clinical, administrative (management, legal and financial) and IT leaders. The telehealth team will be responsible for the tactical planning and implementation of the telehealth service offering(s). Basically, the membership of the team needs to reflect the community of stakeholders who will use and support the program. Key positions on the team include:

Telehealth Coordinator: The telehealth coordinator is the "single point of contact" to help coordinate meetings, assets and manual telehealth visits (if applicable). He or she is responsible for the daily operations of telehealth sites, including scheduling appointments, setting up test equipment, collecting evaluation data and supporting physicians and other providers during consultation. The telehealth coordinator is also the primary liaison between the telehealth team and the larger healthcare community.

Clinical Champion: Each clinical discipline or service line will need its own clinical champion. In the planning stages, he or she will help define the workflow and should be involved in endpoint evaluation from a clinical usability perspective. The clinical champion can help to determine project success metrics and promote adoption of the process. During implementation and rollout, the clinical champion can also help refine the workflow and remove unexpected obstacles.

IT Technical Lead: The IT technical lead will be responsible for leading the technical components of the program. A good candidate for the IT technical lead is the manager or director responsible for the video and communications infrastructure. Communication skills are as important as technology skills for the IT technical lead. He or she needs to be able to act as a liaison between the clinical and administrative team members and the IT department, or third-party consultant who will implement and support the required technology. The IT technical lead will work closely with the telehealth coordinator.

3. Assess the opportunities, needs and capabilities of your community and organization

Understand the needs and demographics of your community.
Telehealth is a service, and like any service, to be successful in its market, it has to address a recognized problem and solve it in a way that reflects the character and values of the providers of the service and the users. Basically, the service has to solve a problem and do it in a way that the people who have the problem will be willing to use.

It's not enough to have a well-designed telehealth program. You need to understand the demographics of the communities you serve, identify gaps in care that can be met by telehealth and determine patients' access to the Internet and other devices necessary to participate in the service as well as their willingness to receive medical care in new ways.

You also need to evaluate the vision, commitment and enthusiasm among clinicians for adopting workflow change and the integration of new technology into their clinical practice. It may not make their job easier, but it shouldn't add a new layer of inefficiency and frustration.

Evaluate the readiness of your IT infrastructure
Don't wait until after you've picked the technology to find out if it will work in your IT environment. This is where the IT technical lead on your team can be a tremendous asset. He or she can lead an assessment and interpret the results to fellow team members. He or she can also look for opportunities to leverage infrastructure upgrades or other IT projects that are already in the works.

A strategic IT assessment for telehealth should evaluate:
- Network, compute and storage readiness for the telehealth solution
- Interoperability with clinical and administrative systems, such as the EHR, picture archive and communication systems (PACS), and related storage capacities
- Security, to ensure the solutions are HIPAA compliant and protect PHI
- Data analytics, to manage and transform the collected data into actionable knowledge
- Cloud and managed services to leverage cost savings, flexibility and availability
- Business continuity and disaster recovery to ensure that the telehealth solution is resilient and "medical grade"

4. Design your telehealth program

Often, the impetus for a telehealth program will come from a clinician who has a preliminary idea for a solution to meet a specific need. Healthcare organizations on the high end of the telehealth maturity continuum, however, have learned to hold off on the formal design of a telehealth technology solution until an appropriate needs assessment has been completed and workflow and technical requirements identified.

Once the assessment is complete, the organizations understand the need their program addresses, the community it serves and the capability of their organization to support it. They are also aware of other telehealth programs they may be able to leverage. The design of a successful telehealth program must be informed with that knowledge.

One key caveat about technology: Don't let technology drive your telehealth design. Too many telehealth solutions are designed for a specific technology or device. There is much more to telehealth than technology on a cart. Focus on the specific needs that clinicians and patients are facing, and the technology will take care of itself.

5. Develop a business plan and financial model

To be sustainable, telehealth solutions need to contribute positively to the bottom line of the healthcare system from direct revenue, quality of care outcomes, revenue protection, productivity gains or access to growth opportunities. Alternatively, some telehealth solutions focus on achieving charitable or "community benefit" goals of non-profit healthcare systems. Exactly how your telehealth program is going to contribute to the bottom line is what belongs in your financial plan.

There are some challenging unknowns to deal with. Reimbursement for telehealth services, for example, is a very complex topic that involves private insurance, Medicare and Medicaid policies, as well as state telehealth reimbursement policies. The trend is toward parity for telehealth services with comparable conventional services, but don't assume anything. If your telehealth program or service offering depends on reimbursement, you need to know the status of reimbursement policies in your state.

Generating revenue is not required to justify a telehealth service. One hospital, for example, implemented a tele-dermatology service that was provided to patients who require a routine follow-up without charge. The service paid for itself through increased productivity, by freeing up scarcely available schedule slots for new patient appointments (reimbursed at a higher rate than an in-office follow-up), as well as by enhancing patient care and satisfaction for current patients—and their primary caregivers.

Telehealth will support many different financial models. The important thing at the outset is to establish the program's unique business and financial objectives, outline how the telehealth program will meet them and determine key indicators you can use to measure results.

6. Design a project plan

A well-designed project plan will address the required tasks and milestones necessary to successfully establish the telehealth service or program in a timely manner. For this type of project, it is especially important to consider the integration of the new processes into existing clinical workflow. The changes to workflow should not be seen as workarounds or one-offs to accommodate the new service but rather changes that will become a seamless part of the provider's everyday practice. Communication and training efforts need to be carefully planned so that awareness, both within the healthcare organization and local community, is heightened and clinicians, as well as patients, are provided an optimal level of training and usage support.

The project plan will also define how the technical components of the telehealth solution will be integrated and tested with current systems, like registration, scheduling, clinical documentation and other modules of the EHR. This will require close collaboration between the clinical leaders who understand their goals for a specific use case and the internal IT department or third-party IT consultants who can design and implement the required technology.

The telehealth team obviously plays a key role in this step. The project plan needs to be aligned with the overall clinical and IT strategy. Expertise and guidance from within the affected service line, your process improvement team and multiple IT disciplines is crucial during this phase. If the necessary skills are not available in-house, designing the project plan could be accomplished in collaboration with a trusted third-party consultancy.

7. Develop internal and external marketing plans

As mentioned above, communication is key to the success of a telehealth program, both internally and externally.

Internally: It's not enough to have a compelling use case that meets a specific need. You need to develop a systematic internal marketing plan to communicate the value of your telehealth program to the community of clinicians who will use it. They have to know what's available and be motivated to use it. They also have to be trained in how to use the service—more on this in tactic #9. The best telehealth solution in the world won't work if key clinicians in your organization don't participate fully. The best motivator is to show them how telehealth can be used to improve the quality of care for their patients.

It is also important to market your use case to maintain buy-in by department leaders and executive management. Stay engaged with them after the implementation. Let them know what you are doing and how well it's working.

Externally: The success of your telehealth program is dependent on your patients' willingness to participate in a distance medicine encounter. It also depends on the active support of the external providers who will be referring patients to your program and collaborating with your clinicians as part of a patient's care team. Your understanding of the community you serve is your best asset in this marketing effort.

Enlist the help of your organization's communications department to reach out to your regional community with marketing, public relations and advertising campaigns to build recognition and enthusiasm for your telehealth program. Designated members of your telehealth team need to be prepared to be interviewed by the local media, to participate in public discussions, contribute to relevant blogs and assist in the preparation of news articles and features.

Successfully marketing your telehealth capabilities has the additional benefit of establishing your organization as a thought leader in the industry and attracting the generation of millennial doctors for whom robust connective care capabilities are a minimum requirement for employment.

8. Identify key metrics to measure outcomes

To borrow an adage: "You don't always get what you want, but you often get what you measure." You need to identify metrics that will reveal if your telehealth program is living up to expectations.

Metrics for a telehealth program could include:
- Frequency of use and clinical efficacy
- Impact on clinical outcomes such as reductions in 30-day readmissions
- Satisfaction, both clinician and patient
- Level of access to underserved communities
- Number of referrals and portion of market share
- Revenue, both gained and retained
- Productivity

Reviewing the metrics on a regular basis and using the data to identify opportunities for improvement is paramount to sustain a relevant program. Recurring process improvement cycles using a framework (i.e., the Model for Improvement (plan-do-study-act) recommended by the Institute for Healthcare Improvement), will help ensure that your program is operating optimally and meeting its goals.

9. Design a training plan for clinicians and support staff

There is a learning curve to every new service, especially one as technical as telehealth. You need to help the people who are going to use and support your telehealth services climb their respective learning curve as quickly and smoothly as possible. Bad impressions at this stage are going to be hard to resolve later on. You need to overcome the tendency most people have to want to do things tomorrow the same way they did them yesterday.

A training plan for your telehealth solution has two key components: training on the technology and training on the workflow. Your training plan should identify:
- Who needs to be trained in clinical departments and IT supporting departments?
- What leave-behind and online training aides are needed to supplement in-person training?
- Will training be delivered ahead of time in a classroom or "just in time" in the clinical environment or both?
- Who will deliver the training? Ideally, will there be super users who will be able to train the trainers to extend the reach of your training program?
- How many trainers are needed and during what hours of the day?
- How long will in-person training support be available?
- How will newly hired or rotating service clinicians (e.g., residents) be trained and supported?

Investing the time and energy to create a strong training and support program will pay strong dividends in overall clinician satisfaction and adoption.

The Telehealth Transformation Journey

There are many steps along the telehealth transformation journey to the realization of the full potential of telehealth to extend and enhance care to your community of patients, and do it in a way that supports the well-being of your healthcare organization. There is no one size to fit all or one right way to proceed. Every organization's journey is unique.

As with all the other changes that have been thrust on the healthcare industry in recent years, each organization needs to find its own way, consistent with its values and sustainable with its resources.

The nine tactics we have presented in this white paper can be used as light posts along your own telehealth transformation journey. What they illuminate will depend on the community of patients you serve and who you are as an organization.

Taken together, they provide a road map that can help you proceed with confidence, and in your own way, to integrate telehealth in your future.

About the Author

Kim Garriott is Principal Consultant, Healthcare Strategies for Logicalis Healthcare Solutions. She helps healthcare clients develop thoughtful telehealth strategies that maximize the value of their investments, ensuring the expected business outcomes are achieved.

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