

# making the occ. health switch

Five things to consider when replacing  
occupational health software



The time has come to upgrade the solution you use to manage occupational health and compliance. If your organization is like most, you're likely using some combination of commercial applications, spreadsheets, home-grown databases and perhaps even paper to get the job done. **Chances are, this cobbled together approach is no longer cutting it.** As you head down a different path, we have found that the following five considerations will help you reach a better destination.

## 1 acknowledge your pain

Face it, using your current occupational health IT solution hurts. Perhaps it requires so many **clicks** your team needs an ergonomic assessment.

Maybe you're sick of plummeting productivity — not to mention morale — as your staff spends precious time manually re-entering data, assembling information from **silos** and circumventing application **shortcomings**.

If your workarounds no longer work and you find yourself struggling in a culture of accommodation, it's time to overcome the negative inertia, recognize the long term gain from getting rid of the pain, and commit to change.

You already feel the pain. **Acknowledge it. Own it.**

And use it to fuel the development of a business case to convince your colleagues that the time has come to make a change.



**Tip:** Make a list of all that ails you and your current occupational health IT approach.



Start with the users of your current occupational health application(s). Understand their **frustrations** and **concerns**, and solicit their feedback on what they expect from an enhanced solution.

Next, put together a **cross-functional team** of stakeholders from across the organization that represent different and important points of view. The obvious players are involved in clinical operations, safety, risk management, compliance and human resources. If you are able to find a comprehensive solution, these departments might also serve as funding sources.

Given the sensitive nature of employee health information, individuals from information technology, cyber security and privacy domains will no doubt have something to say about the process.

Last but certainly not least, most organizations have a **procurement** function that can help manage the selection process, negotiate agreements and secure legal counsel and approvals.



**Tip:** As you assemble your team, identify persuasive and influential champions and advocates and enlist their help. You may need it to convince some individuals that yesterday's good enough is not nearly enough for today's operating environment.

**Remember your pain points?** Turn those into useful prerequisites — the new solution must have, and have to avoid, requirements that are non-negotiable.

Add in the **additional items** — those want them, need them, gotta get them capabilities that will enhance efficiency and improve employee health and wellness.

And since you're already making a list, **think big** — identify the fantasy features and functions that could add significant value.

With your list assembled, prioritize and assign weight to each item so you have objective criteria to use as you evaluate potential new solutions. The net result is a shared definition of success.



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**define your requirements**



**Tip:** Turn this wish list into a workhorse. With slight modifications, it can be used as source material for an RFI, a software demo guide, a vendor evaluation scorecard, a solution comparison tool, and even the basis for a statement of work.



# map your 4 process

Before you begin evaluating potential vendor partners, make certain you have a defined process. In many organizations, there is already a prescribed approach for selecting a new vendor. As we have been to this movie more than once, this is what we typically propose...



First, **do your homework**, which generally involves talking with colleagues, benchmarking with similar organizations, visiting vendor websites, and conducting phone interviews with potential partners. Often, the aforementioned wish list is modified to create an RFI designed to collect information and thin the vendor herd.

Second, invite a select group of vendors to **conduct software demos** — starting with an overview demo and followed up by finalists presenting another round specific to your most important use cases. As your team interacts with vendors, scorecards should be used to grade each organization with the same objective criteria.

Third, as you work your way down to one or two candidates, ask for **preliminary pricing** to make sure your preferred solution is in the ballpark. If so, the next step usually involves a careful review of IT, security and privacy requirements to make certain those left standing pass muster.



**Tip:** Whatever your process, document it, secure stakeholder alignment in advance, and stick to it.

Since you took the time to put a process together, follow that process from start to finish.

Develop a set of tools designed to propel your team forward, using your wish list as the basis for vendor evaluation **scorecards** and solution **comparison charts**. Use these tools to minimize subjectivity in the early stages, saving the “I really like these guys/gals” arguments in the event of a tie between two objectively equal solutions.

As you narrow the field, think **globally** and **long-term** about what will be best for your organization as a whole.

At the end of the process, you should be well-positioned to select a partner and armed with the documentation needed to justify your choice.

With the decision made, communicate with each vendor — providing them with honest feedback as a reward for their efforts. If the incumbent vendor will not retain the business, be fair as you will likely need their cooperation to make a smooth transition.

## **5** work your plan



**Tip:** Celebrate with your chosen vendor, and make arrangements to act on your decision and get deployment under way. While moving to a new solution is never easy, you are about to relieve the pain you have endured for far too long.



## about Enterprise Health

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