

Amber: Welcome back to the Raising Tech Podcast. This is Amber Bardon, your host. On today's episode, we're going to be discussing one of my personal favorite topics: the technology roadmap. For us at Parasol Alliance, we believe that the technology roadmap is the foundation to a successful technology vision at every senior living community. You have to know where you are to be able to know where you want to go. So today we're going to unpack what a technology assessment is, what are some key outcomes, and we're going to learn how your community can get there. We're going to be talking with Karen Layman, a client of ours who recently completed a technology roadmap, so we can get her fresh perspective on that process.

Karen Layman is the President and CEO of Mennonite Health Services, which is a member association that also includes the MHS consulting division. So Karen, can you please just give us a brief introduction of who you are and what our listeners need to know about Mennonite Health Services?

Karen: Thank you, Amber. Thanks for inviting me to be part of this podcast today. So MHS, Mennonite Health Services, we have about 78 members all across the United States. And we also have a hospital system as a member in Puerto Rico. All our health and human services organizations serving primarily senior living. But we also have intellectual disability organizations and a number of mental health organizations as well. So we are fairly large and we also with our consulting practice, serving our members and also serving clients outside of our membership. So that's MHS. I personally do a bit of member services with our members also do quite a bit of consulting services as well and work with many organizations throughout the country.

Amber: Thank you for that introduction. So Karen, you have so much experience in the field and it was such a pleasure to work with you specifically on this project. So Karen and I met and we worked together specifically in a community in Oregon called Mennonite Services Northwest and more specifically at Mennonite Village, which was the primary senior living community as part of that organization. So to kind of set the stage because Mennonite Village was a pretty typical client of ours in terms of their pain points with technology. Karen, can you tell our listeners what drove you to seek a technology assessment?

Karen: I stepped in, was asked to help the organization really discern their future direction that there had been a leadership change and the organization managed two assisted living entities and also had three affiliate organizations. So it's a system in Oregon as you described. So when I stepped in trying to figure out what's the services being provided, how complex is the organization, what's the satisfaction of those that are being managed? I mean, just an overall assessment. And I learned pretty quickly that there was a real disconnect when it came to technology. So there was the sense at a corporate level, that technology was being served and all was great. But then at those service level, more at the customer service level, I found that there was a huge disconnect. And so there was this disparity between what some, some persons in responsible positions thought was happening. And those that were actually on the receiving end, who said, no, this is not happening. And when I tried to figure out, you know, from my own background, I have limited IT knowledge. I saw there was no way that this was something that I could figure out. And I knew that if I was going to help this organization, we had to give them a roadmap or a plan in terms of their technology.

I mean, several of the organizations are still doing manual payroll. I was shocked at that. And so I knew I needed help. Somebody to help me figure out where to prioritize and how to even analyze the situation.

Amber: This is a really great example of where a technology is more than just the computers that sit on people's desks. We started out with the interviews with the key people in the organization and with the affiliate organizations. And it was clear pretty quickly, that there was a lot of process issues going on. Like you said, there was a lot of duplication happening. You know, there was a lot of manual things, things on paper, and this was a huge source of employee dissatisfaction. It was actually really exciting to me that pretty quickly we were able to identify some pretty easy, or maybe not easy, but some easy to identify changes we could make in the technology environment that could address those issues. And I love that that's the beauty of this technology roadmap that we can really look at this holistically. We can include the multifaceted pieces of technology to really provide this comprehensive solution.

So I just want to take a step back really quick, before we continue on with the Mennonite story, just to talk about the foundation of how do we build this technology assessment and roadmap? So it's kind of two parts. So one really key part of building a successful technology strategy is these interviews that I just mentioned a few minutes ago. So I think that that's really important. And I think that maybe that's one of the benefits of having a third party come in and do these assessments is because possibly you might get some more openness with staff to have somebody come in and conduct these interviews. And we typically do these interviews over a period of about three days onsite. And it's up to the community who you include in this interview process. But we recommend really meeting with key people across the organization. So really anybody who's using technology from a residential services, assisted living, independent living, skilled nursing, dietary, social work, all the clinical areas, of course the administrative areas, executive leadership, and the kind of questions you want to ask them: what are you doing manually? You know, what are the things that cause you frustration and your pain points? And staff, they have ideas. They have things that they want to share with you. They think about this a lot. They think about what could I do that would make my job easier. Maybe there's something that they were told to do a while ago that nobody ever told them to stop doing so they keep doing it. So it's a really great place to generate ideas and identify places for process optimization.

And it can be really effective when you can take that feedback and then actually implement that and show action items and what you can actually accomplish with technology. So that's one part to the technology roadmap.

The other part would be what you would think of as IT side of things. So that would be conducting a full IT system review. Now again, when I talk about it, I'm not just talking about the computer piece, I'm talking about the servers, the network, security. I'm also talking about things like your low voltage system, your door access system, security cameras, your phone system. And I'm also talking about things like your business systems like we were just speaking of. So the, the enterprise systems you use to run your business, your HR systems, your scheduling systems, your dining systems.

I like to envision this like a pyramid. So the foundation you've got your core, IT systems, computers, switches, IT operations, servers, things like that. We want to make sure that that base is up to date. It's being replaced on an ongoing basis. It's appropriate for the size of the environment. It's got built in

disaster recovery, backups, all of the things you need to do to have a stable network and system that is able to be maintained, recovered, and secure. And then on top of that, we've got what we call business systems or applications. So what we're looking for here: are these systems effective? Are they optimized? Are they the right systems? Are they integrated with each other? And are you even maybe lacking systems? Are you using paper? Like we just spoke of in this situation specifically. So we really want to get those systems as effective as possible because time is money, right?

8:57 - So we don't want your staff doing things. On paper, we don't want them double entering data. We want systems integrated as much as possible. And so through those first two parts of the pyramid, we're really making your organization use technology as effective as possible.

And then the next level on the pyramid would be security. And security is really this lens in which we view the other parts of the pyramid through. There's always this balance of security versus convenience, and that's for each community to decide for themselves what that balance is. But we want to be looking at each decision we make, what's the most secure and also will cause the least amount of convenience to the end users? And this is just becoming so much more important every day. And then above that, we have residents, residents are a key part of this, and we've done a couple of resident technology plans independently of the community resident strategic plan. And resident technology is a whole separate topic. We'll be talking about that more in future episodes. But that's kind of the way you can think of the technology strategic planning. So Karen, after we went through this process and sort of this pyramid fashion I just described, can you tell me a little bit more about some of the key takeaways you had?

Karen: I have to just say Amber, that there was a lot here. Like, I didn't know what I didn't know. And it was the same for many of the staff as well. And I just have to commend you that you did a marvelous job navigating, so there's some fear that's involved in this kind of an assessment. There's a fear from those who maybe have some ownership in the system that they think is set up very well, versus those of us coming in, who go, how do we set this up and, and why didn't we do this? You know, so there's a fear that comes. And then there's also that sense of that there's, that there's this opportunity to fix. And so that's very exciting. So I just have to say you did a really good job of navigating between that, you know, that defensiveness and also that excitement that you received when you were on the campus. But I think what you did is you gave us very clear path to what we needed and it was a path. So we knew getting the report and your feedback. We know exactly, this is what we, where we need to start. This is kind of a stair step. And I think the challenge right now is the investment of time and energy. And you know, how we're going to make that next step. Because one of the things that we discovered in this process is that we don't have the right team either. And so we really ongoing if we don't have the right technicians and leadership, who's the responsibility for the IT structure, we're going to continue to make additional. So I think that's the other piece to it as well.

Amber: And I think you know, speaking to what you mentioned, that those onsite interviews, that's where you build those relationships, because I think it's important to circle back because there can be a lot of fear. That's a common thing that we see when this outside consultant comes in to do this, you know, this plan, there's always defensiveness, people they're proud of what they've done, and they're it. And they don't want to be questioned on that all the time. And I think you know, to have this open approach and we talk about the positive too, we don't just come in and look for problems. So you know, I think that is really important is to take this approach that, we're not here to find problems, we're here to

help you build something better for the future and for the community and for the residents. So I think I just wanted to kind of circle back to that.

And just to kind of give our listeners a better kind of picture of this outcome that we're talking about. So, you know, the actual output of the assessment, it's a couple of pieces, so there's an actual assessment, which is about a 30-page document or so, which is really a written out analysis of the current state of technology in the community. So it has an operational assessment, a business systems assessment, a systems assessment and network assessment. And it really just lays it out in layman terms as much as possible, really what is going on in those areas. And then underneath each of those sections that has recommendations, and then those recommendations are taken from that document and then they're put into what we call the roadmap. And this roadmap is really the living document. You know, you can sit and write strategy all day. And Karen, I assure you know this as your company does a lot of strategic planning, but if you don't use your, your strategy, there's no point, you know, you can write a strategy and put it on the shelf, but we really want to execute that strategy, right?

So this roadmap is really that tool. And ideally this roadmap becomes the IT budget and it's revisited quarterly, ideally, annually and then updated every three years. So really the power of this roadmap is we take all those areas that I mentioned, low-voltage, business systems, optimizations and then of course your IT. And we're putting it all in one place. So you can see the technology needs across the entire community, even if you might not think of some of those areas, is IT, and we're able to prioritize, where does the community really need to spend their resources so that you're not focusing just one area on one piece, but you're not coordinating it globally. So Karen, tell me, you know, what were some of the high level outcomes that you, that you found from this process?

14:42 Karen: I had the hat on, of the new person coming in, who the board asked to do an assessment and give them the overall what are we going to do? What's our best way forward? So I had that hat on and that perspective, and I needed answers. It's just like often when someone from the inside from the outside is coming into an organization, they often want to do an employee engagement survey. So they understand what's the status of the employees right now. A lot of times they want to do an operations review. I just need to know what's what, and so the main thing that this review did for me was it gave me that big picture and at both a low level and a very high level and roadmap, like you said earlier.

And so that document now, I've transitioned out of the interim role and I've transitioned that so what a colleague is now serving in that interim role, and he's now working with the leadership team on implementation. And so there was not a whole lot of work that needed to happen. How you laid that out was easily read, easily understood. And so it is our next step. If that's, we're going to use that to fix the structure. I mean, starting at a very low level, trying to get some of our payroll systems online. I don't know what else to say other than it's a roadmap for, for us to implement the changes that we need.

Ambr: Yeah. And I know you're pretty early in this process too. So let me just take a couple minutes and talk about with some of our other clients that have been clients of ours for a while, how this process can kind of play out you know, how you might be able to use this roadmap kind of long-term.

So, you know, one of the ways that we like to execute the roadmap is through project management and I'm a certified project manager, so I love to talk about projects. So, you know, ideally the process we use it, of course, you know, it's up to every community, how they want to execute a roadmap. But this is a process that we use that works pretty well. So we take that roadmap, it's kind of the starting point. And then what we like to do is review it every quarter. So we meet with our clients every quarter and we

bring up that roadmap all, first of all, that roadmap ideally becomes the IT budget. So really what we're doing is we're looking at that same roadmap, but it's condensed down to an annual budget that we want to make sure is the appropriate resources are allocated for the year and not everything in the roadmap is a budget item. So for example, there could be a line in there to optimize an existing medical record system. So that could be in there. And that would be in there because it's resource intensive. We need to spend a lot of time on this and it possibly could be a budgeted item because maybe we need to add some more modules. We need to get some professional services or something like that. But either way, we want to make sure that it's in there and it's being looked at. So every quarterly meeting we'll bring up that roadmap. We'll take a look at it. We'll know what have we completed? What's in progress, maybe something new has come up, maybe there's been regulatory changes and we maybe need to add something. So a really great example of that with COVID was AcuShield or a visitor management system like Accu shield. So it was interesting because we actually had a system like that in every client roadmap, before COVID hit, it was kind of a low priority item. You know, visitor management was something we wanted to automate for our clients, just because that's a paper process, but it was kind of like in year three is kind of a low priority. Well then COVID hit. And of course everybody suddenly wanted to implement something like that. And it was actually great because we were like, oh, we've already got this in your roadmap. We kind of have some estimated costs. Let's just bump up the priority. We already know who are the vendors out there. Let's get them on the phone, let's build our requirements lists than we were able to just kind of pop that in. You know, that would be an example of something we could kind of just raise up to the priority, cause we've already got it in our roadmap. We've got that every quarter, we're looking at it, it's a living plan when it comes to it governance, we really like to see steering committees that are client sites, that represents the key areas of the organization.

We really, I want technology to be, to be a partnership. We like to move away from this idea that, okay, technology is just a line item in the budget and we want to spend as little money on it as possible, sorry to the CFOs listening to this podcast. But we want technology to be something that is a competitive edge for your community. We want to transform your community through technology. We want it to be something that you're excited about that can benefit you. So, to do that, we have to see how we can use it. We have to think of it as a solution. And if we're constantly thinking about it, we're reviewing it, we have buy-in, we have people across the community, looking at this roadmap all the time and thinking about these projects and what can we do and how can we be efficient and use technology? That's kind of the idea behind the steering committee. So there's these quarterly meetings. And then, like I mentioned, every year we were revisiting it, we're looking at it annually, making sure things are appropriately budgeted.

Of course, we want to make sure that the big items are in there to make sure that our systems are refreshed. We've got our updates coming. And then we're kind of able to plan around there based on what's left. So our resources are properly allocated. And then every three years we wanted, you know, you want to keep looking forward and want to keep trying to do more with technology. What's out there, that's new. We have a client that's doing a campus expansion and they're putting robotics into their new buildings and they're doing smart home technology. So, there's always new things that are coming out. I like to personally say that senior living technology is the wild west of technology because there's so much opportunity and so many new things coming out. So that's just some ways that you can actually implement this roadmap and use it as a living document and just as your guide to just continue executing and doing more and more with technology.

So Karen, one question I have for you is what would be your advice to anybody who's looking to start this process?

Karen: Well, obviously start with you. And Amber didn't ask me to say that. No, I'm the kind of person, I'm the kind of leader that, I know what my limitations are and sometimes that, when you need help and you know that this is beyond your capability and beyond your expertise. So I reached out and asked for help and that was the first start is to and then to hear you describe this process, so you described this process to me in detail, and I knew immediately that that's what we needed. And that that's what the information, I was struggling with staffing. Do we have enough staff or is it an efficiency issue? Is it the system that we're using or have we not fully implemented that software program? I mean, there was just a lot that I didn't know, but the way you presented this roadmap and this assessment process fit all of my check boxes and I knew it was the thorough kind of insight that I needed to figure out where we needed to go.

Amber: Well, Karen, it was such a pleasure to work with you on this specific project. And I really appreciate you coming on this podcast and sharing your insights. So thank you for your time.

Karen: Thank you.

Amber: At our next episode, we're going to talk about all things, resonant technology. We have some special guests, so looking forward to that, so be sure to tune in and thank you for listening today.