Digital transformation

A guide to your health and social care survival

Care Redefined

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Care Redefined

Digital transformation is re-envisioning and driving change in how you operate. That's a management and people challenge, not just a technology one.

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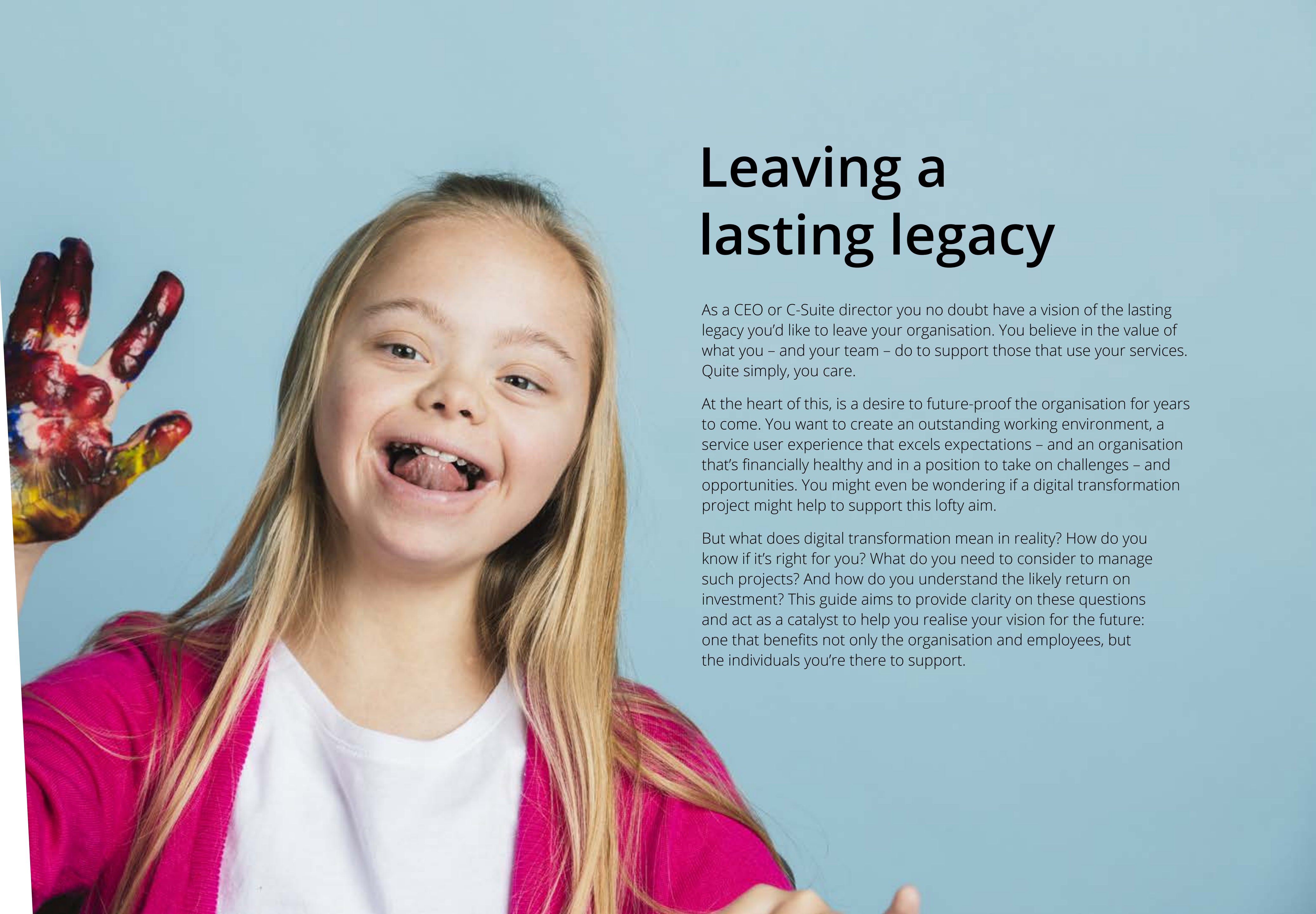
Leaving a lasting legacy

As a CEO or C-Suite director you no doubt have a vision of the lasting legacy you'd like to leave your organisation. You believe in the value of what you – and your team – do to support those that use your services. Quite simply, you care.

At the heart of this, is a desire to future-proof the organisation for years to come. You want to create an outstanding working environment, a service user experience that excels expectations – and an organisation that's financially healthy and in a position to take on challenges – and opportunities. You might even be wondering if a digital transformation project might help to support this lofty aim.

But what does digital transformation mean in reality? How do you know if it's right for you? What do you need to consider to manage such projects? And how do you understand the likely return on investment? This guide aims to provide clarity on these questions and act as a catalyst to help you realise your vision for the future: one that benefits not only the organisation and employees, but the individuals you're there to support.

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What does digital transformation really mean for the sector?

At its core, digital transformation is a strategic process that involves people, processes and technology, with the intention of changing the way an organisation operates for the better. In particular, it can support you with the challenges you face when managing budgets or the myriad of different stakeholders including the board, trustees, care inspectorates and employees.

From reputation management, employee on-boarding and retention to the financial health of the organisation and general operational processes, digital transformation can help you and your team to do more of what matters – both day-to-day and at a strategic level.

As a result, this can greatly improve the quality of care delivery, and create a more organised and efficient working environment to help your organisation fulfil its purpose. Here are just a few of the wide-ranging benefits it can bring:

1. Eradicate the processes holding your organisation

Tired, ineffective – and often manual – processes impact both you and your front-line staff who simply want to deliver great care. This was a problem that Nigel Henderson, chief executive of Penumbra, recognised. Many of his team worked out in the community but they needed to return to the office to update systems or fill in paper forms, when they could be spending time supporting people with their recovery. Staff well-being and happiness was a high priority for the organisation and an important factor behind the decision to change their systems.

A digital transformation project can provide the tools to help your front-line staff carry out their role more effectively and with greater satisfaction. It also makes the organisation as a whole more efficient. For instance, carers can:

· Update service user notes at the point of care with no need to rely on memory or heading back to the office to complete at a desk. All of this information populates handover notes, making the whole process much more succinct and precise. With an audit trail of who has done what and when, it's clear what care was provided, which is particularly helpful if there was ever an issue.

· Verify time and attendance electronically or submit mobile expenses, which are then interfaced to the payroll or finance systems. There's no need to rekey information and no worry about misplacing forms, saving a great deal of back-office admin. The manager is alerted and once approved they can be paid in the next payment run.

Paying staff accurately and on time not only aids retention but also can reduce churn and the need to recruit too. Organisations ahead of the curve are even introducing mobile app such as Access Early Pay which allows staff to receive the wages they've earned so far that month, transferring them to their bank account in seconds.

The improvement this can make to morale can't be underestimated – particularly when coupled with applications that help to simplify daily working practice. These can improve the quality of care and services as admin is quicker to complete so carers and employees can spend more time with service users or providing other value to the organisation. Not only does this help to improve satisfaction for those that are being supported with your services, it allows your teams that important breathing space to pay extra attention to their overall well-being.

> **Action point**
> What are the processes that impact how effectively your carers and employees can carry out their work? You may be aware of many of them but it's worth asking teams too. Note every process you can think of – there's usually always a way that these can be automated or streamlined with software and technology. In some cases, you might be able to eliminate them altogether.

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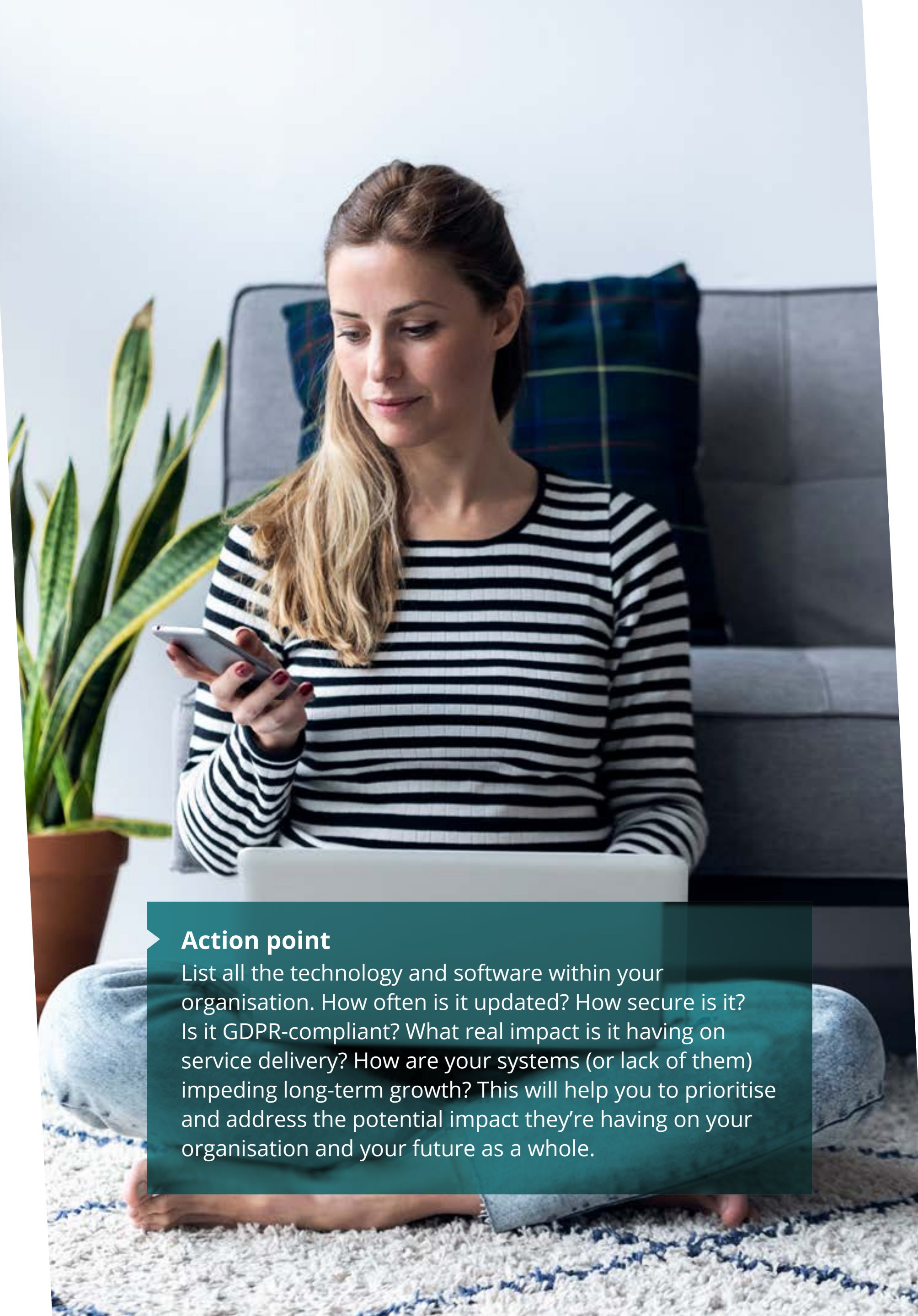**Action point**
List all the technology and software within your organisation. How often is it updated? How secure is it? Is it GDPR-compliant? What real impact is it having on service delivery? How are your systems (or lack of them) impeding long-term growth? This will help you to prioritise and address the potential impact they're having on your organisation and your future as a whole.

2. Rid your organisation of end-of-life or out-of-date systems

Many organisations are moving to cloud-based solutions. Whilst there are wide-ranging reasons behind this shift, they can help to future-proof software investments as well as provide a competitive advantage. Here's why:

- Aside from mobile devices, there's no need to invest in hardware (such as server rooms, or connectivity within your offices or in care homes). The software itself and the servers on which it runs is all taken care of by the technology provider.

- They can protect against cybersecurity attacks and data breaches. Having the tools to support your General Data Protection Regulation (GDPR) processes, for example, can help to avoid costly fines and a major dent to reputation and support in winning future contracts.

- Having robust disaster recovery provides peace of mind. Health and social care organisations can ill-afford to lose access to their data for any length of time. A reputable cloud-provider can make sure you're covered with robust disaster recovery procedures.

- Running newer tried-and-tested functionality usually leads to improved processes, more efficiency and less time wasted. That's more time to spend on care and service delivery, and increasing revenue and funding.

- The ability to scale the organisation faster supports the C-suite objective to grow the care services and for some, look to attract investors and funders. A growing thriving organisation is also attractive to prospective service users and new employees.

3. Save time, money and gain access to accurate data for smarter, real-time decisions

Many health and social care providers spend too much time searching for information, whether in paper files on a shelf, spreadsheets on a desktop or server, or even disparate software systems. For many there's simply no integration linking all the data together. The purpose of the technology supporting a digital transformation project is to join up all the systems and make it easier to access your organisation's information and report on it, saving time and money in the process.

This makes it easier for management teams, board members and trustees to see what's going on in the organisation, providing the reporting and analysis they need to steer the organisation in the right direction. Some of the benefits include:

- **Access to live data:** whether that's financials, care management, payroll, invoicing, HR and rostering, scheduling, training, electronic medication administration record (eMAR) management, electronic care plans, risk management and incident reporting as well as details on funder management. Dashboards provide an instant snapshot of the KPIs that matter to you most.

- **Accurate and timely reports:** for example, the profitability of each individual health care organisation, contract or consolidated reports for the group as a whole. A breakdown of actual and committed costs helps to provide a clear position on financials as well as ensuring that resources are well-managed. Pull off reports at any time – no waiting until month end, by which time they're out-of-date. Alerts by exception can also highlight when problems occur.

- **Smoother CQC/care inspectorate/ CIW inspections:** with all information pulled from one central system, there's no need for the manual collection of data. This saves precious time and resources that could be devoted to running the organisation. It's often looked on favourably by the Care Quality Commission (CQC) itself as more efficient and effective organisations are likely to provide better care to the service user too.

Action point
What management information would you like to have access to? How much time (and resource) is wasted creating reports every month? With every task you spend time on, it's costing you money and taking away resource from something else. Is that task worthy of attention? If so, could it be carried out more efficiently? Digital technology can provide the tools you need to support decision-making, helping you to run and manage the organisation better.

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" Access was the only provider who could offer an integrated end-to-end cloud-based system, allowing us to take a leap into a new and exciting future **"**

Nigel Henderson
CEO Penumbra

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The 7 tell-tale signs you need to embark on a digital transformation project

Hopefully, you have a better understanding of what digital transformation could mean for your care organisation, but how do you know that it's right for you? There are often tell-tale signs which highlight the cracks in your current processes and systems which could be causing your organisation to struggle. See how many of the following signs apply to you:

1. Lack of visibility and control:

The management team don't have access to the information and reports they need, when they need them, which makes it difficult to fully understand the true health of the organisation and report back to the board and investors. This results in constant firefighting, moving from solving one problem to the next.

2. Contract churn impacts profitability:

Monitoring contracts to ensure they remain profitable is tough – as is the need to avoid contract churn. Maybe contracts are not being renewed for funding reasons, or as in a growing number of cases, you're having to hand back contracts because you can't make them profitable. This could also be because of inefficiencies in your own organisation, meaning that care delivery may not be at the level it should be, leading to lower client satisfaction.

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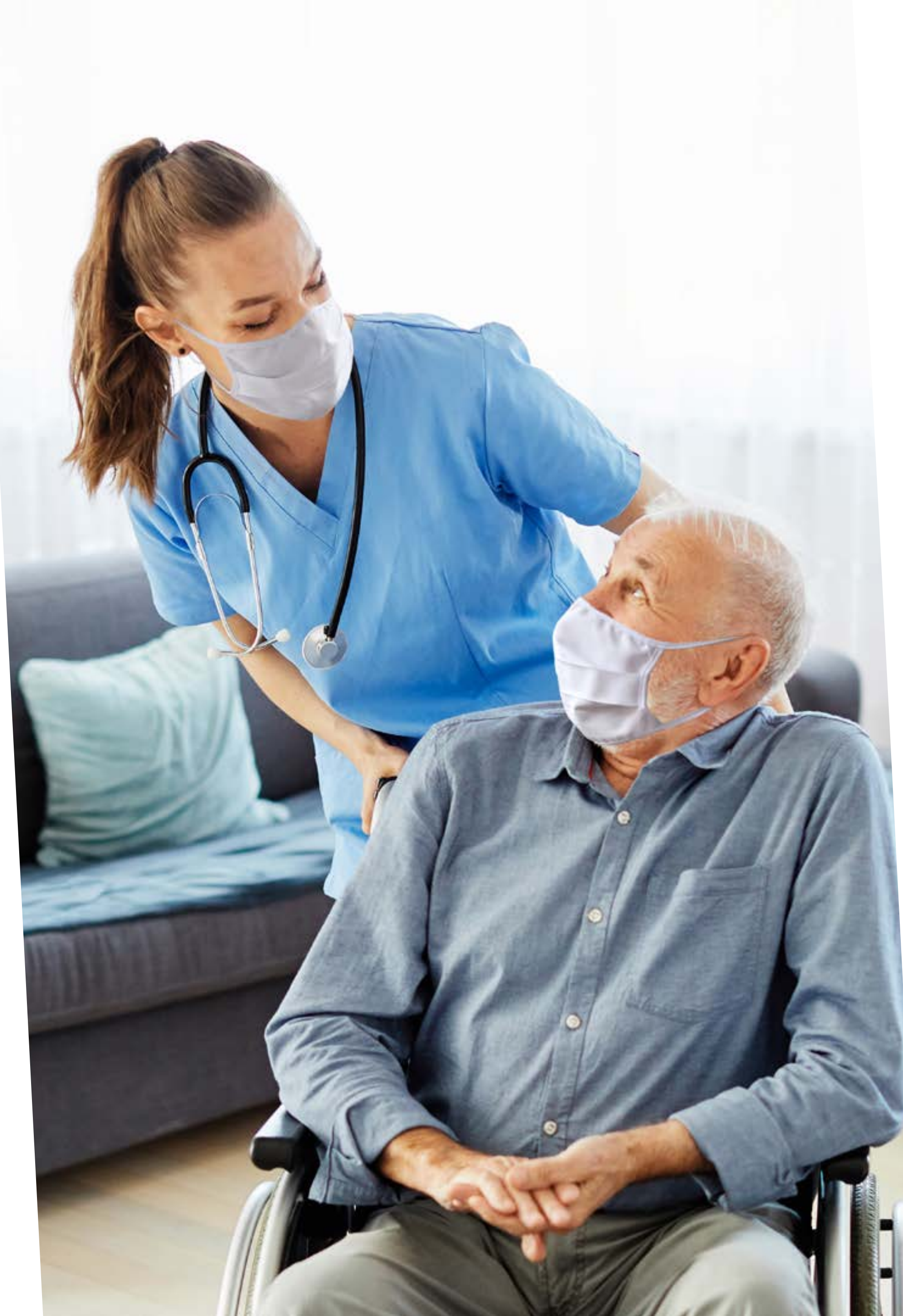
3. Poor staff retention:

Employee churn remains one of your biggest – and rising – costs, from recruitment and onboarding to ongoing training and retention. With 70% of a care organisation's costs committed to staffing, not having effective systems, processes and procedures in place can make the task hard to manage. You want to pay higher wages to attract and retain the best carers but you're margins and profits are so thin that it's impossible to do so.

4. Too much time spent on manual processes:

Staff complain they don't have enough time to spend with service users because they're bogged down by admin. Even worse they have to make special trips to the office if they're community-based. This is a constant cause of frustration, not only for the carers but for the management team too. You know that your practices mean the organisation as a whole is not operating at maximum levels of efficiency, and that this ultimately has a knock-on effect on the quality of care or services and organisational growth.

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5. CQC inspections are a nightmare:

You dread an inspection because it's difficult to get all the information together and your resources are stretched to the limit. Finding the time and money for the extra cost puts a burden on finances. When it comes round, it's all hands on deck just to get through and a sigh of relief when it's over. You know that if your current systems were better, it would support your efforts to be rated Outstanding – or make it easier to maintain your rating.

6. Your systems are out-of-date or end-of-life:

You know this could be storing up trouble for the future and that any technical hitch could leave your organisation stranded without access to service user notes and other critical records. With the rise in cybercrime and potential data breaches, you also realise this could mean your organisation is open to fines – not to mention reputational damage.

If any of the above resonate with you, now could be the time to think about making changes. There's an old adage that insanity is doing the same thing over and over again but expecting a different result. This is particularly pertinent if you and your teams are faced with recurring issues. That's often a sign your systems and processes could be improved – and a good indication that a digital transformation project may be just what your organisation needs.

7. Inadequate risk and reputation management:

Poor care delivery can have serious and even fatal consequences – and this is a constant source of concern. Protecting all employees and providing best quality care is of utmost importance, alongside this you're responsible for the overall reputation of the organisation, you're never entirely sure that policy, process and procedure are being correctly followed – and you worry about how prepared the organisation is for major incident management. You know that mistakes can put a care organisation out of business – even if they're unintentional.

Action point
Solicit feedback from your staff, particularly those that are on the ground. What processes or tasks take the most time or distract them from delivering care or services? From this create a top 5 list of processes/tasks that are putting the biggest strain on the organisation and those that are contributing to poor staff morale. How do these mundane/laborious tasks impact the team morale? Could those tasks be eradicated or made much simpler with software? How much time are your staff spending on admin vs delivering care and services?

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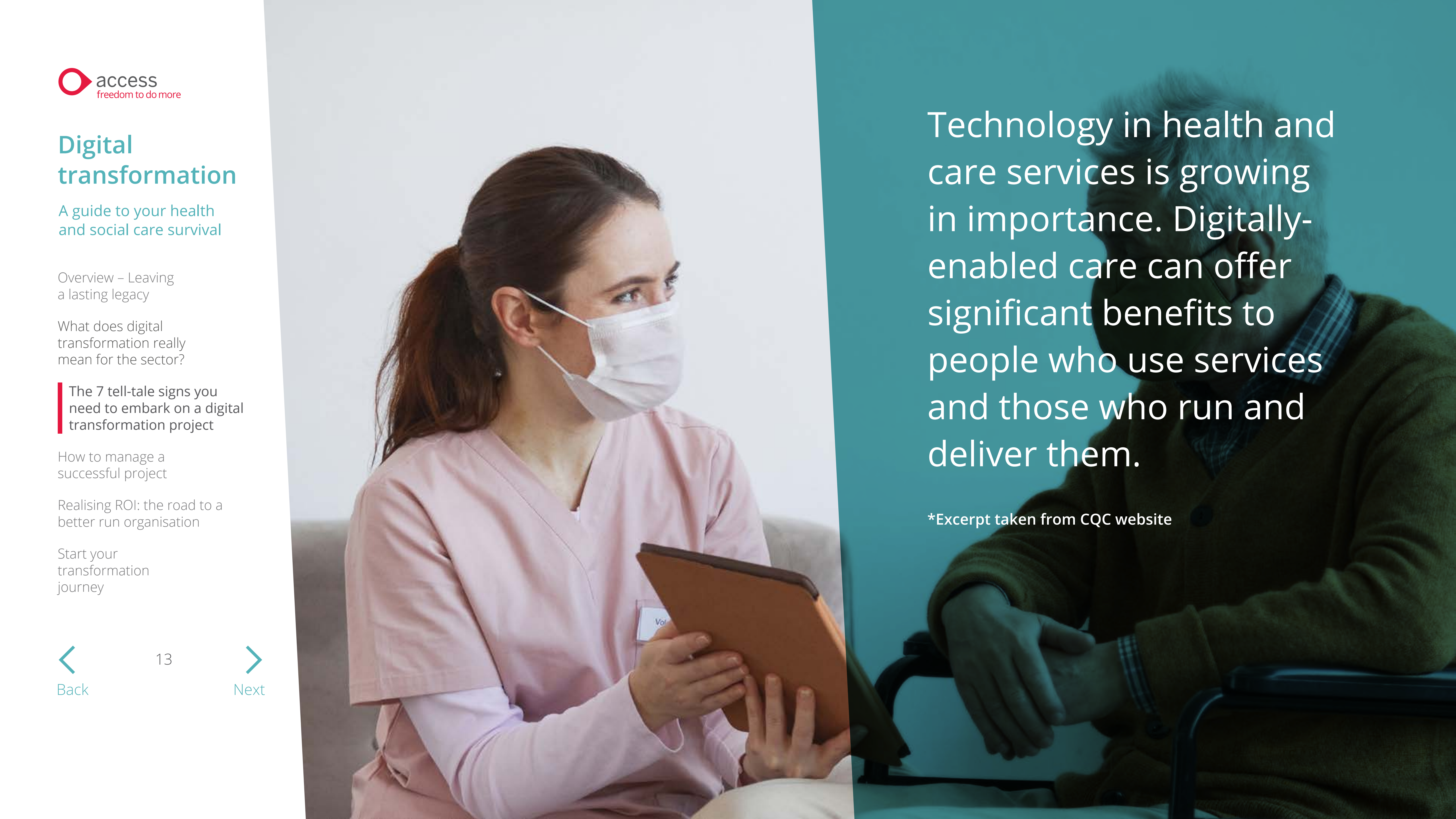
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Technology in health and care services is growing in importance. Digitally-enabled care can offer significant benefits to people who use services and those who run and deliver them.

*Excerpt taken from CQC website

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How to manage asuccessful project

Once you've decided that a digital transformation project is right for your organisation, you'll want to plan out the steps you need to take and how the project will be managed. There are several points to consider:

Create a business case:

This will articulate why the digital transformation project is essential for the organisation, what will be involved, how it will improve operations, what the costs are, the expected return on investment – and what the project will mean for the organisation's future. At this point, you'll have a clear vision of what you're looking to achieve. Typical outputs would include;

· Reduction in staff churn

· Contract profitability and churn

· Increase in care and services provided

· Increased revenue

· Reduction in costs

· Increased care quality and improved inspectorate reports

· Improved risk management

Get stakeholder buy-in:

Include the management team, investors and employees, as soon as it's practicable to do so. When drafting the business case, view the digital transformation from their perspective. How can it make the carers' lives easier? Help management achieve the business strategy? Meet the financial targets for investors? Step into the shoes of every stakeholder who will be impacted by this project. Given them a vision that makes the future brighter and removes the pain of where they are right now.

Choose the right partner:

Review the options out there including what other care providers are using, and talk to them. What was their experience? What other advice would they give? Find a digital transformation partner you can trust. You need to know you can rely on their team as well as their software, particularly when it comes to large-scale projects. Does their product roadmap indicate that they're committed to the health and social care sector? They need to be experts in your field and understand in-depth the real day-to-day strategic and frontline challenges you face.

Assign a project manager:

A dedicated resource is a must. One person should have the overall responsibility for overseeing the day-to-day management of the project, working with internal stakeholders and the external provider. This makes it easier to keep the project on track – particularly if stakeholders understand that its success relies on their cooperation.

Define clear timelines:

Don't try to do everything at once – and avoid critical times where you know resources will be spread thin. Start by implementing your core systems first (such as HR and care management) but identify areas of quick return – the introduction of electronic expenses, for example, which provides a positive improvement to both staff and the organisation. This will give the project positive quick wins and will help to gain acceptance across the organisation. Phasing gives the project time to settle in stages and enables you to refine any minor issues before moving on to the next aspect of the project, helping with user acceptance and adoption.

Allow time for training:

The best software is intuitive and most vendors will have training videos that provide step-by-step guidance. This is all many employees need – but bear in mind that some staff may not be quite so comfortable with technology. Take baby steps. Get those who are tech-savvy to support those who aren't so confident. This can make it less scary – once they get the hang of it, they'll never want to go back to the old, manual way of working.

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" We wanted one supplier, one contact point for support. We didn't want to be told 'that's not our responsibility you need to speak with another provider'. Having one partner is very attractive to us. **"**

Nigel Henderson
CEO Penumbra

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Realising roi:

The road to a better Run organisation

No digital transformation would be deemed successful without achieving the return on investment that was set out at the start of the project. That's why it's important to be clear upfront on exactly what you want from the final outcome – and to set a baseline so you can measure success.

Of course, you could base it on payback period, internal rate of return (IRR) or break-even analysis but that doesn't provide the full picture. It is also important to consider the wider benefits that a digital transformation project brings such as the cost savings from removing manual processes, improving efficiency and introducing automation. These usually compound over time as new processes and functionality is introduced and the care organisation continues to make incremental improvements.

It's worth remembering that digital transformation is an ongoing journey. Benefits will be realised along the journey and will provide your organisation with a platform for continuous improvement.

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Success can be measured in several ways, including:

Time saved by standardising and eliminating manual processes	Cost savings on travel and purchases	Reduction in resources for CQC/care inspectorate/CIW inspections (as well as improvements in ratings)	Reduction in organisation and staff overheads e.g. back-office admin or agency fees	Improved contract margins and new contracts won or funding received
The increase in time carers spend with service users	Increased employee retention and satisfaction	Reduction in onboarding costs and time to onboard new team members	Greater levels of retention and satisfaction amongst service users	Reduced cost of compliance and improved risk management procedures
Reduction in time spent generating reports and data analysis	Reduction in capital expenses due to cloud-based software solutions	Real-time access to measurable data	The ability to take advantage of new opportunities such as service expansion and acquisitions	

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Anecdotal evidence should also be included. Ask staff how much easier it is when it comes to handovers, administering care and managing their work schedule. You could send out a survey to staff, service users and their families to gauge improvement in working practices and levels of care.

These give a much broader picture of the true benefits that digital transformation will bring to your organisation – something which isn't captured in the traditional ways of measuring ROI. Once stakeholders experience the benefits themselves, it can often have a long-term effect, and one where your employees can be encouraged to provide feedback on how the organisation can work more effectively.

> **Top tip:**
> Ask stakeholders if there are still any problem areas that need to be addressed. This is an opportunity to understand any remaining issues or where further improvements can be made.

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The National Autistic Society undertook a digital transformation project to improve its operational efficiency and save £350,000 per year to re-invest in its life-changing work.

"We're spending public money, so it's essential that the charity is as efficient as possible. This is why we undertook this digital transformation project, but it will also help us in our drive to improve quality and compliance by joining up our systems and making monitoring and reporting simpler."

Kelly Evans,
Director of finance at The National Autistic Society

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Start your transformation journey

A digital transformation project is, in reality, an organisation transformation project. It helps to deliver the best care, speed up (or eradicate) admin processes, help carers do their jobs better, improve retention rates, reduce overwhelm, control costs, manage risk and enable the organisation to function much more smoothly.

It provides a solid foundation upon which to base future success. Whatever challenges or opportunities come your way, an integrated software solution, that's always being updated with the latest functionality, will ensure the organisation is more agile. Not only will this help you to survive, but most importantly to thrive. And that's probably the best legacy you could ever wish to leave.

> **Action point**
> Talk to one of our Health andSocial Care transformation expertsto find out more about how you could create your lasting legacy.

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