

THE ESSENTIAL GUIDE

to changing vendors for lab equipment and IT systems

A COLLECTION OF INSIGHTS AND STRATEGIES FROM LABS THAT HAVE EXCELLED IN VENDOR CHANGE MANAGEMENT

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Why is this guide essential?

If you're a lab leader looking to change vendors, you're facing a major undertaking. The benefits can be immense, matched only by the potential hazards. While this change can impact the organization far into the future, one of the critical stages is the transition itself.

During this transition, a major fear for many labs is the unknown. How will a vendor prepare you for change? Ensure seamless workflows? Minimize the impact on your productivity? Because there are many factors in choosing the right vendor, the selection process can be very overwhelming.

This underscores the urgency to choose a best-in-class vendor—one that goes to great lengths to ensure minimal disruption and sustainable success.

Follow along as this guide highlights what to expect from a best-in-class vendor in every aspect of the change process, from pre-implementation to post-implementation and beyond. You'll see what "best-in-class" really looks like, so you can make the right choice. This will not only have long-term benefits for your lab, but your entire organization.

CHAPTER 1

Professional & peer consultation

One way to evaluate a potential vendor-partner is to determine how they provide value beyond instrumentation. A best-in-class vendor takes a holistic view of your lab and identifies solutions to your biggest challenges. This helps set the stage for a rich partnership, by replacing fear and uncertainty with confidence and excitement in making change.

Chapter goal:

Establish expectations from a best-in-class vendor in consulting your lab on opportunities for success.

Leading with a consultative approach

One of the most important characteristics of a vendor is how they treat their relationship with you. Instead of a transactional relationship, a best-in-class vendor will foster a consultative relationship. This starts with the first interaction you have.

This class of vendor should surprise you with how much they know about your lab, even before a contract is signed. This is because they've already taken extensive measures to familiarize themselves with the challenges and opportunities of your business.



What's your vendor relationship?

Some vendors are more transactional. Some are more consultative. Here are what the key differences look like:

Transactional	Consultative
Interested in making the sale	Interested in making a partnership
Focused on your instrumentation	Focused on your overall performance
Spends time telling you about products	Spends time asking you about your needs
Limits engagement after implementation	Continuously follows up to refine performance and ensure goal attainment

Susan Mammina

Director, Laboratory & Pulmonary Services Spectrum Health

"We were looking for a vendor who understood us as a customer and who really took the time to learn about our needs and patient population. Roche spent time in our laboratory investigating our different shifts and assessing our workflow efficiency."

Consultative vendors identify problems before they happen

They do this by engaging you and asking specific questions, to proactively determine the best solutions for your lab.

For example...

- Do you need faster STAT assay turnaround time?
- Are you suffering from a bottleneck in your automation track?
- Do you need a testing platform that can handle rising volume?
- Are you looking for a broader assay menu to consolidate your testing platforms?
- Is your lab part of an ACO/IHN that needs to produce standardized results across the organization?
- Are you looking to integrate all lab instruments through one middleware system?
- Are you looking to achieve 98% instrument uptime?
- What are your organization's biggest demands for your lab?
- Are you searching for a new way to optimize your workflows?

Your vendor should understand these challenges early and know exactly how their solutions can address them. They should even let you know about future upgrade possibilities for longer-term planning.

Beyond getting to know your lab, a best-in-class vendor proactively helps you manage change by shedding light on your industry environment. They'll discuss regulations, restrictions, market events, government affairs, and more, so you can better understand how these may affect your lab—before and after a change in instrumentation.

Ronald McLawhon

Director of Clinical Laboratories
Professor of Pathology
Head of Division of Laboratory & Genomic Medicine
UC San Diego Health System

"We needed a full-fledged partnership that included working together corroboratively to meet current and future business needs. I've had a long history with Roche so I know their track record as a strategic partner."



Raising the bar with a lab process analysis

Looking to realize these advantages?

- Increased ROI
- Stable and predictable process results
- Processes that can be measured, controlled, and improved
- Improved safety ratings

A lab process analysis (LPA) is a service that consultative vendors provide to help your lab revolutionize its performance relative to your goals. It is vital to achieving each of the advantages above. For a best-in-class vendor, it follows a 5-step methodology.

Step 1: Define

The process starts with a best-in-class consultation, in which your vendor will gain an in-depth understanding of how your lab is operating—what’s working optimally, and what’s not. This involves defining customer expectations and requirements, as well as how to measure them. Your vendor will engage multiple stakeholders within your organization, from high-level executives to lab technologists, to get a big-picture view of needs and goals.

With this insight, they’ll identify your *critical-to-quality metrics*, which are your key measures of improvement.

Step 2: Measure

Your vendor will measure the current performance of all relevant business processes. This involves developing a data collection plan, collecting the data, then plotting it for review.

Step 3: Analyze

Data will then be analyzed, so your vendor can determine the root causes of each issue and identify opportunities for improvement. A key component of this is identifying gaps between current and desired performance.

When quality is critical

The Roche LPA illuminates a multitude of critical-to-quality metrics in these four critical areas:

- **Cost**
(ex: 20% reduction in overtime per 24-hour production cycle)
- **Productivity**
(ex: 35% reduction in non-value-added process steps)
- **Quality**
(ex: 25% increase in percent of results autoverified)
- **Service**
(ex: 45% reduction in routine and STAT TAT, receipt to report)

Chuck Huggins

Technical and Operations Manager,
St. Charles Medical Center

“There were many opportunities for failure. It was critical for Roche to have an in-depth understanding of our needs and goals.”

Step 4: Improve

Your vendor will map out a custom performance improvement process for bringing your lab into its future vision. This will include floor planning, workflow refinement, process mapping, and more. Once established, this plan will be deployed and all process improvements implemented.



The value of Lean and Six Sigma certification

Lean- and Six Sigma-certified professionals are experts in developing efficient workflow processes while reducing waste. They use industry-validated best practices to optimize your lab’s productivity and help you provide the greatest value to your organization.

Step 5: Control

For a best-in-class vendor, the LPA doesn’t end with implementation. Instead, you can expect this vendor to follow up with measurements to track your goal attainment and performance improvement. Without this follow-up, even the most well-conducted LPA could come up short in helping you achieve your lab’s long-term goals. That’s why a best-in-class vendor goes the extra mile to control the effectiveness of the performance improvement plan—today and into the future.

With Roche, you’ll always have an expert on your team

Roche process consultants are Lean- and Six Sigma-certified experts, specializing in lab operations, process engineering, automation, and more. Many are former lab directors themselves.

Your Laboratory Process Consultant (LPC) Team:

- **29 years** of laboratory and industry experience (average)
- **100%** have laboratory-based educational background
- **75%** have a Master’s Degree or higher
- **100%** have lab management experience
- **7 years** of laboratory lab automation experience (average)
- **Certified** in process analysis (Lean/Six Sigma Black Belt)

Virtually amazing

During an IT consultation, Roche runs your LIS data through a **virtual simulator** to give you a projection of future performance and operations.

Looking to have a robust conversation with a potential vendor?

Use the “Critical Questions to Ask” at the end of each chapter during your on-site vendor visits. This will help you account for some of the most vital issues related to change management and beyond.

From consultation to realization

Here are 2 real-world accounts of how a Roche LPA resulted in practical benefits on the organizational level.

Surrey Memorial Hospital

Hardin Memorial Hospital

Hospital stats

- 1.5 million patients served
- 400 ED visits/day
- 715 beds (recent 34.4% increase)

Vendor change

- Beckman Coulter to Roche

Hospital stats

- 70K patients served
- 200 ED visits/day
- 270 beds

Vendor change

- Siemens to Roche

Goals	Results
Quality—2x autoverification	Nearly 3x increase
Quality—Ensure predictable TAT while reducing manual aliquots by 50%	92% decrease in manual aliquoting (4.2 hours saved/day)
Cost—Increase workload units per hour	10 minute reduction in test time (average)
Cost—Better management of growth and space	42% decrease in square footage equipment footprint
Productivity—Reduce manual archiving, scanning, and overall process steps	77% reduction in analytical process steps (4 hours/day saved)

Goals	Results
Quality—Improve TAT	<30 minutes receipt to result
Quality—Improve care for patients with blood volume considerations, like neonates	80% decrease in neonatal redraws
Cost—Reduce spending on consumables	\$17k savings by reducing number of tubes
Cost—Reduce volume of fluids used	\$240k savings
Productivity—Reduce sample rejection rate from ED	74% reduction in redraws
Productivity—Increase reliability and efficiency	From 46 to 1 service call per month

Sherrie Warren

Operations Manager
Lower Mainland Labs

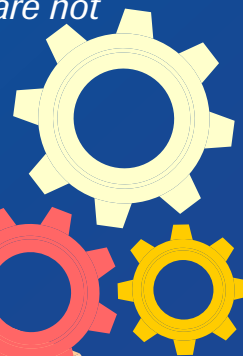
“Before, everyone in the chemistry department was running around looking for specimens and reagents. Now, people are calm, sitting at their instruments, doing their work. In fact, more people are applying for jobs in our department than ever.”



C.J. (Charles) Hayko, CLS(ASCP)^{CM}

Core Laboratory Supervisor
Hardin Memorial Health

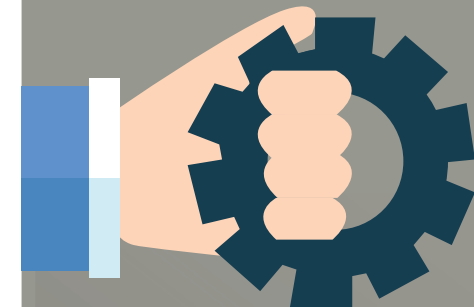
“Taking a deeper look will reveal how much your current system is costing you right now—in ways that are not immediately apparent.”



Technical IT consultation

A best-in-class vendor appreciates the value of a seamless IT transition—and delivers nothing less.

To start, your vendor should give you an in-depth consultation, specifically related to IT. This is part of a comprehensive approach in which they'll consider all LIS functions and integrations.



In a best-in-class IT consultation, your vendor will

- ✓ Analyze current software and integrations
- ✓ Evaluate desired connections and features
- ✓ Fully understand performance goals
- ✓ Identify challenges in your lab that IT can help solve
- ✓ Advise best practices for third-party connections

Your vendor should also be able to quantify the expected ROI from their middleware solution. This will be a useful way to predict efficiency and productivity gains by implementing their IT and consulting services.



Looking to calculate an ROI specific to your lab?

Ask your Roche representative about how to calculate the ROI of implementing Roche Middleware in your laboratory.

Expert engagement comes standard

In preparing for change, a best-in-class vendor will provide opportunities to engage with industry experts. Either one-on-one, at live events, or through an online resource, these engagements will help broaden your understanding of relevant market forces. These include healthcare reform, reimbursement shifts, clinical trends, and more. You'll be able to learn best practices that go beyond use of the products, without the involvement of salespeople.

With this access, you'll gain a better sense of what change is warranted in your lab, to fuel richer discussions with your vendor. This is an often overlooked but invaluable resource that represents a true, leading partnership.

Consultation from your peers

While you should expect a best-in-class vendor to facilitate a robust consultation, not all of this comes from the vendor firsthand. Another highly valuable outlet for leading advice is other labs that have partnered with your same vendor.

By connecting you with these labs, your vendor establishes a valuable peer-to-peer network that can further the information-sharing value of each member.

These peer networks promote honesty and openness, creating shared benefits for all who participate. New members gain a level of understanding, comfort, and clarity in the change to come. Heritage members continue to optimize their workflows and operations. With distinctive benefits for all, this invaluable resource is a mark of a truly best-in-class vendor.

Looking for a shared experience?

It's amazing what you can learn from a peer lab when you share your implementation journeys, go-live learnings, optimization tips, and more. These pieces of wisdom come only from sharing experiences with other labs like yours.

Taking the lead

LabLeaders.com is Roche's commitment to today's industry professionals. It offers exclusive insights in the areas of lab leadership, healthcare reform, and redefining the value of the lab.

How will **LabLeaders.com** inspire you?

LabLeaders.com
Redefining the value of the laboratory. Together.

Philip Chen, M.D., Ph.D.,
Chief Healthcare Informatics
Officer, Sonic Healthcare

"We need to broadcast knowledge about leveraging the power of the lab. We need to make it a professional movement if we are to help change the entire healthcare industry. And that is what we're doing here."

Jeff Myers, M.D., Ph.D.,
Director of Anatomic Pathology
and MLabs, Vice-Chair for Clinical
Affairs and Quality, The University
of Michigan, ASCP President

"What pathology needs most is an understanding of the opportunities that are just beyond our reach. These opportunities will only be accessible if we have the right leaders in place who can reframe the value proposition in our complex and evolving healthcare ecosystem. I am absolutely convinced that with the right leaders, the best days for pathology are ahead of us."

Best-in-class vs. less-than-best: Professional and peer consultation

Here's a snapshot of how a best-in-class vendor stacks up against the rest when facilitating lab consultation.

Best-in-class	Less-than-best
Views the relationship as consultative	Views the relationship as transactional
Asks questions to determine the best solutions to your specific needs	Focuses on the features of their own instrumentation
Proactively informs you of future product upgrades for long-term planning	Focuses only on their current portfolio
Demonstrates great knowledge of how the industry environment affects your lab	Has limited or outdated knowledge of your industry environment
Conducts an in-depth lab process analysis to evaluate performance	Doesn't offer consultative services on improving lab processes
Performs follow-up measurements to track goal attainment and performance improvement	Offers no or limited follow-up tracking of progress toward goal attainment
Lean- and Six Sigma-certified experts help your lab discover new efficiencies	Consultation is provided by uncertified non-experts
Thoroughly prepares you for an IT transition	Expects customer to handle IT implementation on their own
Offers access to industry experts to help you manage change beyond products	Offers only product-related engagements with salespeople
Connects you with an extensive peer-to-peer network for further support	Offers no peer-to-peer support network

Clearly, a best-in-class vendor offers you exceptional consultation in multiple ways—sometimes from other sources altogether. This class of vendor truly values your partnership and is invested in your long-term success.

The power of peers

Roche goes beyond making connections by delivering strategic peer-to-peer resources. Here are some of the live events and online networking opportunities you can expect, which cater to the full spectrum of lab professionals

Lab leadership

LabLeaders.com: Roche's commitment to the lab leader and those aspiring to be one. With exclusive strategies, insights, and action plans from today's industry innovators, you can learn how to reinvent your role and redefine the value of your lab

L2 Summit: An exclusive opportunity for customers to engage with experts in laboratory medicine, learn from peers, and see what's on the industry's horizon

SmartLab: Held only once each year, this event brings industry frontrunners together with experts in lab leadership to share valuable insights, expertise, and best practices

Peer Xchange Program: Provides a variety of peer-to-peer experiences, including testimonials, webinars, phone conferences, web and virtual meetings, site visits, and speaker events

Operators

Connections: Offers current **cobas**[®] analyzer users the opportunity to develop their skills and continue their education through advanced hands-on training and P.A.C.E.[®] - accredited workshops

IT Users Group: These live events are exclusively dedicated to maximizing the value of your IT. They feature advanced training, demos, and forums for troubleshooting your biggest IT issues

Clinicians and pathologists

CARE Group: A team of key opinion leaders, providing cardiac biomarker education

CHAPTER 2 Training



Changing vendors is only worth its cost if technologists and clinicians are informed on how to get the most out of your new solutions—immediately. That's why training technologists and clinicians is a critical piece of change management, and a critical aspect of a best-in-class vendor.

Chapter goal:
Establish expectations for how a best-in-class vendor provides role-specific training to minimize the impact of change.

Training works best when it's personal

A best-in-class vendor doesn't just act as a consultant in evaluating your lab's needs. This class of vendor approaches every aspect of your relationship through a consultative lens, including training.

For example, before training begins, a leading vendor will provide pre-training materials and access to online training to make you feel comfortable with what you're about to learn. When training formally begins, it will be tailored specifically to your implementation, and each staff member involved will receive individualized training based on unique tasks and responsibilities. This implementation-specific, role-specific approach to training is crucial.

Your lab deserves a customized, needs-based approach to training. Be sure to seek out the vendor that puts forth the effort to provide it to you.



Chuck Huggins
Technical and Operations Manager
St. Charles Medical Center

"I feel a responsibility as part of the lab leadership to do whatever I can so that my staff has the very best opportunity to be successful."

The hazards of non-specific training

- **If a vendor employs a one-size-fits all approach,** they're not taking your lab's specific needs and goals into account—so the training will fail to optimize your lab's ability to meet those needs and goals
- **If a vendor trains each employee the same way,** you'll miss big opportunities to ensure that each professional is performing as efficiently and effectively as possible



Knowing who and when to train

Efficiently coordinating training is yet another way a best-in-class vendor will minimize change-related complications. It ensures that all key members are included and schedules are organized to keep lab operations at their peak.

A best-in-class approach:

- **Before installation:** invite a few of the most directly involved individuals to the vendor's training location before installation, to get extra personal attention and hands-on time
- **After installation:** invite other key members to training later, at times that will have the least impact on your lab

A leading vendor will add even more efficiency and value by equipping each trained staff member to train others. This enables your lab to create a web of knowledge and best practices, which ensures everyone can operate on a high level and new employees can be quickly brought up to speed.

Ensuring success early

Training with Roche means you'll become competent and confident in performing your new daily activities *before* go-live, so that operations continue smoothly and don't grind to a halt. Among other things, this will help you learn the ins and outs of proactive maintenance on **cobas**® analyzers. Because remember...

The **cobas** family of analyzers requires up to **5 minutes** of daily hands-on maintenance to ensure **99% analyzer uptime** and industry-leading Mean Time Between Failure (MTBF).*

*Data driven from studies performed at Roche; not intended to supersede Operators Manual claims.

Another dimension of quality

With Roche, you'll have access to an **online 3D interactive simulator**, which you can use to familiarize yourself with operating an instrument—before you've even seen it.



Training top-to-bottom

While vendors may overlook training certain members to expedite go-live, a best-in-class vendor invests in training at every level of the organization, from the C-suite to the technologists.



Location, location—and access

Just as crucial as the coverage and coordination of vendor training are the location options and accessibility they provide. A best-in-class vendor offers training in a multi-location, multi-media format to give you the flexibility to train in a way that best suits your needs.



See it. Do it. Prove it.

Roche's training specialists follow a 3-step process that reinforces the importance of customer ownership during training:

1. **See it:** observe and learn
2. **Do it:** practice applying skills
3. **Prove it:** demonstrate mastery

Roche enables this through interactive technical demonstrations, in which technologists can practice tasks on actual machinery.

Essential training locations

A best-in-class vendor will offer training on-site, off-site, and virtually, because each has its benefits and caters to differing learning preferences. Here's a look at the valuable aspects of each:

On-site at customer

- Convenient
- Quickly builds comfort in performing tasks in your environment
- Offers training alongside your everyday team

Off-site at vendor

- Highly engaging and immersive
- Fewer distractions
- Tasks can be repeated for quicker mastery

Virtual training

- Accessible any time
- Practice in hypothetical situations without consequence
- Continue or revisit your learning as you choose



Roche Diagnostics University (RDU)

This resource is an always-on, one-stop virtual learning platform for comprehensive Roche Diagnostics training and education needs. RDU empowers this by providing a personalized journey through flexible and innovative methods.

Along with a custom curriculum, you'll gain access to Roche's proprietary learning tools, like **cobas**® Answers and **cobas** Flashcards.

Irene Morgan, MT(ASCP), CLS(NCA)

Supervisor, Chemistry Path & Lab Service
Richard L Roudebush
VA Medical Center

"The support we get is simply extraordinary."

A real-world walkthrough

A best-in-class vendor will also give you the experience of visiting multiple other like-sized labs for a walkthrough. These customer visits will allow you to see real-world demonstrations of how the vendor's training and resources are being applied, to give you a clearer idea of what to expect for your lab. And, by visiting a variety of labs, you can learn about a range of training experiences.

Training beyond the instrument

A best-in-class vendor goes beyond proficiency training. They offer a more advanced program, including clinical education, reagent-specific training, and IT-specific training.



A best-in-class experience

When visiting the corporate office, a best-in-class vendor treats you like a VIP. They go above and beyond to reinforce how valuable your partnership is, and make sure your visit is not only useful but enjoyable as well.

See what's possible

A visit to Roche Diagnostics corporate headquarters in Indianapolis is your opportunity to see what's possible when we work together. 360[view] is a focused experience that is designed around you. We customize the topics, timing, and Roche participants based on your goals for the visit. We'll explore a shared vision for improving patient care and testing efficiency.

What to expect during your 360[view] visit:

- Commitment to your time and needs with a customized program agenda
- Access to the full Roche portfolio of products, services, and solutions in one location
- Interaction with Roche technical support and medical experts
- Engagement in strategic discussions with Roche executives about the challenges and objectives of your organization

Xchanging insights

The Roche Peer Xchange program facilitates live or virtual peer lab visits. This helps to educate and train labs on using Roche instrumentation. But it's not just for new customers.

Experienced lab staff are invited to connect and share best practices to help boost performance at every level.

Nina Wardrip

Lab Director, Baptist Health Louisville

"We had direct access not just to the products, but to their experts as well. The onsite interactions helped us significantly with our decision making."

John D. Allen

Director Laboratory Services
Tucson Medical Center

"Our 360[view] experience was influential in our decision to develop a closer relationship with Roche as a vendor and as a partner."





Clinical education

Along with instrument-related training, a best-in-class vendor will pass knowledge on to you in the form of clinical education—discussing market changes, new results interpretations, and how to respond to emerging trends.

Reagent-specific training

A best-in-class vendor will also train on using their reagents.

Key topic examples

- Reagent preparation
- Space requirements
- Calibrations
- Ordering processes

IT-specific training

A best-in-class vendor also focuses on the IT you'll be implementing. They'll offer multiple resources and materials, both in-hand and online, to ensure comfort very quickly.

Better together

What will you find when you attend a Roche IT Users Group? Open sharing of best practices and uncommon solutions for optimizing your IT.

Medical and scientific excellence

Roche's Medical and Scientific Affairs (MSA) department is dedicated to supporting labs on medical matters. Not only do they provide essential counsel throughout your partnership, but they also play a pivotal role in helping you get your new systems up and running. This helps to ensure medical integrity and clinical excellence from the start.

It doesn't stop there

Ensuring retention

Beyond simply providing training, a best-in-class vendor takes steps to ensure your staff are effectively retaining the information. You should expect this vendor to test your knowledge by engaging you and ensuring you take ownership over the material.

Ongoing learning

When partnering with a best-in-class vendor, training doesn't end with implementation. Learning needs to be ongoing, so training should be too. This provides many benefits:

- Existing staff maintain knowledge
- New staff can quickly get up to speed
- All staff can learn about upgrades and new features

Refining the training program

While training may be very robust, it can still become obsolete based on internal or external factors. To assure training stays relevant and highly valuable, a best-in-class vendor will modify their training program as needed.

They'll identify areas for refinement by soliciting feedback from customers and observing the industry. This enables them to update their program and resources based on market trends, changes in clinical best practices, or to apply new technologies and approaches for added flexibility.

Judy Peetz, MT(ASCP)

Chemistry Supervisor
Southeast Health

"Our Medical Scientific Liaison from Roche was an invaluable resource in the implementation of our new system. She brought all this knowledge and experience to our hospital and it made a huge difference!"

Connect with success

The Roche Connections program ensures ongoing **cobas**[®] analyzer training, so you stay up-to-the-minute on the latest advancements and applications.

Best-in-class vs. less-than-best: Training

Here's a snapshot of how a best-in-class vendor stacks up against the rest when training you on using new lab instrumentation.

Best-in-class	Less-than-best
Provides initial materials upfront to help you feel prepared for the program to come	Provides no training materials or online access ahead of scheduled training
Training is tailored to your specific implementation and staff	Approach to training is "one size fits all"
Offers training in multiple locations with printed and virtual resources	Offers limited training locations and educational resources
Efficiently coordinates training for all beneficial members to ensure total education	Overlooks training key members to expedite time to go-live
Enables key stakeholders to tour like-size labs for real-world demonstrations and accounts	Does not offer walkthrough opportunities, limiting the practicality of training
Thoroughly educates on clinical topics, best practices, and market implications	Minimal education beyond product
Offers training specifically devoted to reagents and IT	Fails to provide training specific to reagent or IT transition
Takes measures to ensure information is being retained	Assumes information is being retained and lacks accountability for training outcomes
Training is treated as an ongoing service for anytime information access	Training ends with implementation
Modifies training based on feedback, emerging trends, and new technologies	Maintains existing training program despite its declining relevance



Training resources you should expect

- Up-front materials
- Print materials
- Virtual training center
- On-site engagements at customer location
- Off-site engagements at vendor location
- Walkthrough of similar lab



Steve Raymond
Laboratory Manager
St. Charles Madras

"With Roche, it's complete partnership from beginning to end."

Robert Fitzgerald
Professor of Pathology, University
of California, San Diego

"When you're looking at a vendor, you really want to select a partner. There are several platforms that can do the job, but who's going to be a partner? Roche has been a very good partner. They've supported us. They're there when we need them."



CHAPTER 3

Project management & implementation

No implementation project can be completed smoothly and efficiently without best-in-class project management. Don't put your go-live goals at stake! Consider project management very strongly when singling out the right vendor choice for you.

Chapter goal:

Establish expectations for roles and responsibilities of a project manager (PM) in supporting a customer through change of instrumentation.

Project manager—your star quarterback

A best-in-class project manager sees the implementation big picture. He or she coordinates the entire operation and makes the right plays to ensure success. Sound familiar? That's because your project manager compares to a football quarterback. He or she is the heart of a sound team that leads the way to victory.

What you should expect from your PM:

- Manages timeline to ensure go-live goals are met
- Mitigates uncertainty and fear of change
- Minimizes workflow interruptions
- Helps lab manage resources
- Acts as a single point of contact



Expect clear expectations

This class of PM will also set clear expectations for everything that will take place during the implementation process.

These professionals give you a clear picture of:

- Timing
- Impact on workflow
- Costs
- Working relationships
- Additional needs

You should also expect a leading PM to highlight their go-live accuracy rate and installation base. This is a great way to evaluate a vendor's track record of success and implementation experience. If the PM doesn't volunteer this information, be sure to ask.

Ensuring a winning performance

The role of PM comes with many specific responsibilities. Here's an overview of how they deliver essential support.

These professionals give you a clear picture of:

- Immediate engagement
- Broad engagement
- Open and personal communication
- Detailed project plan and timelines
- Frequent check-ins
- Specialty PMs
- Tracking progress
- Minimizing disruptions



Pride in performance

Roche places top priority on achieving a timely go-live, over a great number of installations. Here are the data to prove it.

2015 performance:

- **334** systems implemented (analyzers, automation, and IT)
- **98.6%** accuracy (+/- 2.9 calendar days of prediction)

Source: CPMO data: Monthly bill live report. Roche Diagnostics, 2015.

Chuck Huggins

Technical and Operations Manager, St. Charles Medical Center

"One of the key elements of our success was the support Roche gave us on the project management side. It was their high-level oversight that kept everything on track, kept the timeline moving, and helped us achieve our milestones."

Immediate engagement

If you've chosen a best-in-class vendor, you can expect engagement from your PM as soon as the deal is signed. This is the first step to ensuring a fast and painless implementation.

Ownership from within

While a best-in-class PM will manage the project, your lab will still need to appoint its own project lead. This individual will serve as the primary point of contact and coordinator of internal affairs.

Broad engagement

As a true consultant, your PM should engage with all stakeholders in the project. This gives a voice to the full range of professionals and executives, to ensure all needs are considered.

This doesn't just include members of the organization. A best-in-class PM will include every stakeholder—down to the electrician running wires and the water company connecting new pipes.

Open and personal communication

You can expect a best-in-class project manager to keep you well informed throughout the entire process. To add a personal touch, this class of PM is on-site regularly. This allows for productive face-to-face discussions along the way.

Certified experts

Roche PMs are certified in managing the complexities of implementation and beyond. They hold certifications in PMP, Six Sigma, or Lean methodologies so your lab is always in the best hands. Does your vendor provide a certified expert? Or simply a local service manager?



Jonathan Bautista
Vice President of Laboratory Marketing & Operations,
The Blood Center

"The project manager team did a great job of talking us through the whole process from start to finish. They set the expectations up front so we knew what was going to happen."

Charles Wilson
Assistant Vice President
Operations, Robert Wood Johnson
University Hospital

"You never know what you're going to get after the sale. Are they going to follow through on what they said? The Roche team has stood by everything it committed to, and they are valued tremendously by our staff. If you asked our team today, everyone would say we made the right decision."

Mike McKinley
Applications Support Analyst
St. Joseph's/Chandler

"The dedicated Roche project manager was a critical part in getting the installation completed. She did an excellent job, demonstrating leadership and ownership."



Detailed project plan and timelines

Based on stakeholder engagements, the PM will create a unique project plan for your implementation. This includes key milestones to ensure you stay on track.

Timeline should ultimately account for everything:

- On-site visits
- Deliveries of products and instruments
- Installation
- Assay validation
- Much, much more

Frequent check-ins

To keep you informed, your PM should offer frequent status check-ins. You should also expect him or her to follow through with the same care post go-live, to ensure your operations are running smoothly and new instrumentation meets your needs.





Specialty PMs

While many vendors offer a dedicated PM, a best-in-class vendor also offers specialty PMs for specific tasks. These specialty PMs are subject matter experts who assist your primary PM in areas that require more technical or clinical consideration. Such areas include managing IT implementation and reagent preparation. Leveraging their expertise to manage those individual aspects supports success down to the finest detail.



Tracking progress

A best-in-class PM will work with you to set specific goals, and track your progress toward attainment. Based on progress, they can adjust resource allocation to ensure all goals are met on time.



Minimizing disruptions

Not only will a best-in-class PM ensure a seamless transition, but he or she will also be able to install new systems in the same space with minimal workflow disruptions.



Best-in-class vs. less-than-best: Project management & implementation

Here's a snapshot of how a best-in-class vendor stacks up against the rest when managing the implementation project.

Best-in-class	Less-than-best
Immediate engagement—as soon as the deal is signed	Delay in engagement at the customer's expense
Engages with all stakeholders in the project	Only engages with a limited audience (only lab directors or technologists, for example)
Open and personal communication	Limited or impersonal communication
Highlights go-live accuracy rate and installation base	Doesn't offer information about implementation accuracy or installation base
Creates a detailed timeline with a predetermined go-live attainment date	Vague timelines regarding key milestones and final go-live
Frequent status check-ins and regular on-site presence	Occasional status check-ins and limited on-site presence
Provides subject matter experts to assist your PM in highly technical or clinical areas	Lack of subject matter experts to inform specific areas
Works with you to track progress toward measureable outcome goals	Limited or no progress tracking toward outcome goals
Exceptional planning and effort to eliminate any impact on workflow	Lesser consideration to impact on workflow
Follows through post go-live with same dedication to customer service	No follow-through post go-live



CHAPTER 4

Service & Support

Last but not least, industry-leading service and support is vital to easing change. It keeps you assured that your performance is in the hands of professionals who are dedicated to keeping you at your best. When you're preparing for a vendor switch, be sure to assess the many levels of service and support.

Chapter goal:

Establish expectations for a best-in-class vendor in proactive and reactive service and support.



First, what's their philosophy?

Your vendor's philosophy on service will dictate how they treat your business. A best-in-class vendor is never satisfied with good service—they hold themselves to extraordinary. And this takes more than friendliness and understanding. A best-in-class vendor will exemplify these qualities in every aspect of their service:

Proactivity – They don't wait for the customer to ask. Instead, they pay close attention to your needs and goals and make thoughtful recommendations about your instruments, strategies, and opportunities for improvement. This class of vendor will also monitor your performance remotely to identify issues and address them immediately.

Honesty – As a consultative partner, a best-in-class vendor is open and forthright in supporting your business. They appreciate the value of delivering the best solutions, regardless of what they are.

Accessibility – A best-in-class vendor understands that issues can arise at any time. That's why they'll offer constant access to support. This includes giving you a direct line to reach customer service versus an automated 800 number.

Consistency – You should expect your vendor to provide the highest level of service quality, whether it is in-person or remote. They should have the resources standing by to address all issues in the fastest and most efficient way possible.

Thorough reagent preparation

Feeling comfortable using new reagents helps labs feel confident delivering quality results. Therefore, a key factor of best-in-class service and support is thoroughly preparing you for new reagent methodologies.

Essential preparation steps during the pre-implementation phase

- Running correlation and linearity studies upfront
- Explaining results interpretation (also to nurses and specialists)
- Evaluating quality of reagents and lot-to-lot stability
- Explaining new cutoff values
- Standardizing reference ranges

When a vendor performs each of these steps, it will help you avoid uncertainty and reach peak performance sooner.

Spot it. Resolve it.

Roche's service team partners closely with engineers to review service data across all customers. When they spot a critical issue, they alert the lab immediately with a plan to address it.



Roche reagent specialists

Roche offers dedicated reagent specialists to prepare you for new reagent methodologies. They ensure a smooth transition by proactively performing all steps far before go-live.



A focus on the long-term

Beyond today, a best-in-class vendor focuses on solutions into the future. Here are the ways in which they ensure top service for your sustainable success.

- **Minimize downtime** with regularly scheduled preventative maintenance
- **Maintain optimum lab quality** with ongoing performance check-ins
- **Realize the full potential of IT** by optimizing and leveraging your solutions
- **Identify opportunities to improve their own service** by soliciting customer feedback, and taking it to heart



Optimizing into the future

Roche conducts customer business reviews (CBRs) once or twice each year. These are formalized, in-person engagements to ensure each lab is maintaining optimum quality and efficiency. They are also rich opportunities to seek customer feedback.

Ana Brinkerhoff

Clinical Laboratory Manager
UC San Diego Health System

“Roche came to us a year after we implemented our automation and said, ‘Here is what the data are showing us, and here’s how you can do better.’ We really appreciate that because we need an objective eye to come in and tell us what we can do better. Roche is always asking us for ways they could do things better. I really feel like they take it to heart. Roche really listens.”

Best-in-class vs. less-than-best: Service and Support

Here’s a snapshot of how a best-in-class vendor stacks up against the rest in providing service and support.

Best-in-class	Less-than-best
Satisfied only with “exceptional”	Satisfied with “good”
Remotely monitors performance after implementation	Does not monitor performance after implementation
Proactively addresses customer needs	Reactively addresses customer needs
Honest about the best solutions	Promote only those solutions that are profitable or convenient
Offers constant access to support	Offers limited access to support
Consistent quality between in-person and remote support	Inconsistent quality between support areas
Thoroughly prepares for new reagent methodologies	Overlooks needs in reagent use
Performs regular preventative maintenance to prevent downtime	Performs maintenance only when requested or needed
Shows genuine interest in optimizing your business, short-term and long-term	Lacks interest in the future of your business
Earns customer feedback and makes adjustments for better service	Less open to customer feedback and making service updates



