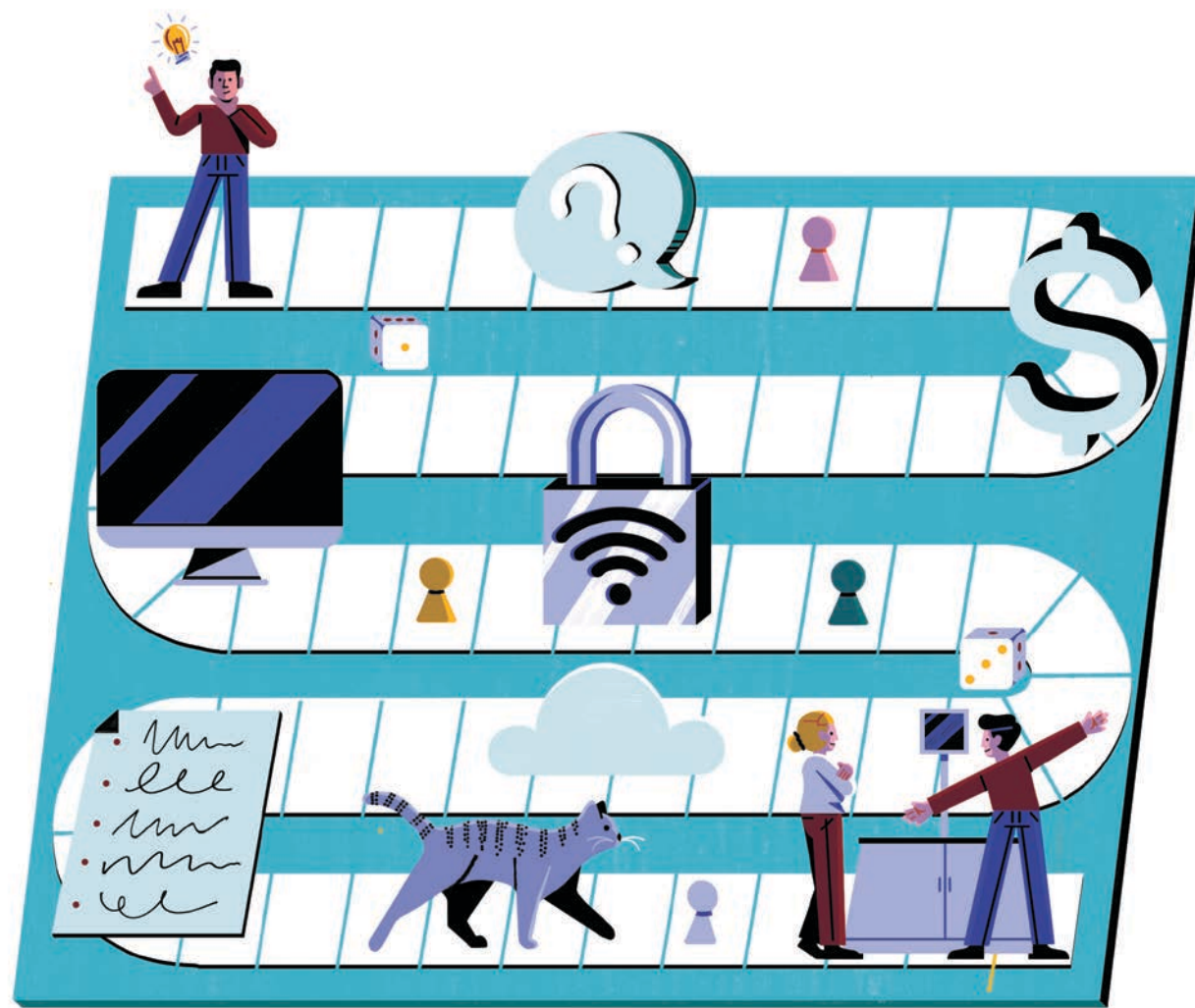


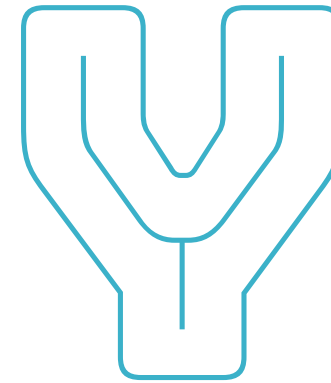


# ALL ABOARD

## PREPPING AND TRAINING STAFF FOR NEW TECHNOLOGY

BY NANCY DEWITZ

Even the best products can be doomed to failure (or neglect) if you do not take the initial steps to set them up for success. Here are the keys to successfully onboarding new technology in your practice.



Years ago, I was gifted an Instant Pot kitchen appliance. I couldn't imagine using it much — after all, I had a pressure cooker that came out for the occasional roast — and from my point of view, it had all the makings of the latest fad. So I banished it to the land of the unused tools. The advertising showed great food that could possibly be made, but not the how-to, or more so, what was in it for me.

How many tools have you purchased with good intentions that now sit in the corner of a room or unopened on your computer desktop? A few flashes of potential caught your interest and *bam* — they sold another one. Sparkle is great, but where is the rest? Many products offer training and some may have implementation assistance, but not all. The veterinary practice is then left to figure the tool out without a clear direction of the “why” it is here, causing a lack of commitment moving forward.

About a year after receiving the Instant Pot, I saw a recipe on social media that looked delicious and, most importantly, easy to prep. Out came the Instant Pot. I proceeded to do my research, read the manual and prepare dinner. That recipe

answered my “why.” Now, the Instant Pot never leaves my counter. I cook everything from hard-boiled eggs to taco meat with it. (I have even made a cheesecake!) The appliance solved a major need in saving me time during dinner prep. What if I had gleaned all this information when it arrived? Had I taken the time to find my “why,” I could have saved hours while it was collecting dust.

When you evaluate or implement new technology in your practice, make sure you keep the “why” as a focus — not only for you, but for all the stakeholders in your practice. Before beginning any process, you will go through assessment and planning. Whether it's a pressure cooker or sophisticated diagnostic tool, the product does not matter. These are important steps to ensure success in the end.

### Assessment

- ▣ Management identifies a need
- ▣ Basic research is performed to recognize possible solutions, including those that may already be in the office
- ▣ Identify key stakeholders for the process
- ▣ Obtain buy-in from the key stakeholders
- ▣ Identify the “why”

### Planning

Begin collaborating with the stakeholders and staff. Ask questions about how this may impact them. Every change brought into the hospital will likely affect at least one team. The best part about this phase is it will create buy-in for any new technology that is being considered through collaboration and open communication.

The next step is to inventory what you have in the products that exist today. If this new technology is replacing something, make sure you have written out what the current solution does for the practice, who it affects and why you are looking for a change. Also add in what features you just cannot lose. Whether it is an X-ray machine, a new analyzer or maybe even new software, there are many different products, so let us look at them by classification.

### New software

If you are looking at new software, whether to run an entire hospital or just an add-on to what you are doing today, find the “why” before you

purchase. Just because someone said you really should have something does not mean you will use it.

- Create a list of the key features and startup considerations.
- What's in it for my team?
- What efficiencies may be gained by the new product in the designated area?
- Are there new workflows the practice would like to implement?
- With a major software purchase looming, list out what section will fit best for each team in the hospital. This will help with training as well.
- Schedule demos and do not be afraid to have more than one as you go along.
- Ask as many questions as you can. Having the right expectation in the end is important.
- Ask questions about the learning curve or the amount of work necessary from the hospital team to implement and convert.
- Price is not everything, but it is something. Know what the budget impact will be. Consider how many monthly add-ons are needed.

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#### Evaluate your IT infrastructure

- Will you need new computers or other devices?
- Will new internet providers be needed to ensure performance?
- Do you have someone to help with IT and online security?
- Do these additional considerations fit in your budget?

#### New medical equipment

This could include a new blood analyzer or a new imaging device. Again, are we replacing old technology with new? In this category, this is an important question as it will really affect training needs. If staff has used digital X-ray, there will be a basic grasp, but if there has only been an older solution, digital may require significant training.

The concepts of selection, training and implementation are similar with the varying technologies.

- Identify the champions for this project
- Create a list of what is in place today
- Formulate a list of what is lacking in current products, thus answering the "why"
- Review options and start to set demo times
- Make a list of any other technology that must interface with the new products
  - Does it integrate in the practice software?
  - Does it connect to the cloud?
  - Is there data to be backed up?

Now that you have done the research, addressed the questions and answered the why, you are on to the next phase.

#### Implementation

- Retrieve an educational plan from the provider
- Identify staff that can be a champion for the install/education process
  - Sometimes it is a good idea for this team to review training solutions and processes to help the other staff along the way
- Allow time for specific staff to make their way through the education provided
  - If this is online, it is quite easy for people to skip sections; this can and will impact their knowledge and use of the product you have purchased.
  - Utilize the champion who can assist (a cheerleader/organizer)
  - Check in with staff on progress even if the product's educational process does not provide learning milestones; they are helpful to set up prior to starting this process.
- Setting install goals will help you stay on task throughout the project. When the implementation drags out, staff reverts to using what is comfortable and will start forgetting what they have learned.
- It is possible to involve clients in the process. Have them update their record information with the practice. This alerts them to a new product or process and helps them understand if things take a bit longer. We all know how it goes with new technology.
- Most important in this process is to keep a cheerful outlook, celebrate the small milestones and know that in the end, things will get better.

#### Adoption

This is the time to celebrate the win. Continue to evaluate how the product is being used. The main thing in adoption of any technology is consistent use. Many times, a business will purchase something, start out great and then usage fades away. Take steps to ensure success.

- Identify steps in a standard operating procedure (SOP) for this new product
  - Start by listing common issues and how to solve them. For example, something as simple as where replacement ink is stored in the practice.
  - Follow up with support numbers and contact information for the correct line of support
- Discuss at your monthly staff meetings to ensure everyone is on the same page with the new product
- Uncover any resistance to the use of the product
  - Misunderstanding of the "why"
  - The need for additional training
  - Issues with the product left unresolved

Be aware of a pitfall at this stage: Valuable time can be wasted while members of the staff try to find answers or are unaware of continued support through the manufacturer and additional services. The SOP for these products will ensure that everyone knows how to access available support.

The process outlined in this article can be used repeatedly with any products coming into the facility. The most impactful step in this journey is to identify and plainly demonstrate the "why" for any change. If you are the only person who sees the value, you will not have a smooth transition for the rest of your team. ■



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Nancy Dewitz is a veterinary industry veteran whose consulting company ([nancydewitzllc.com](http://nancydewitzllc.com)) helps veterinary practices with their technology selections and workflows. She worked alongside other veterinary business experts to co-author the book *The Profitable Vet: Strategies for Financial Success in Veterinary Practice*, which is now available via Amazon and other retailers.

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