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CASE STUDY:
PeaceHealth turns to 3D Results to align performance management strategy and culture

Launching a new performance and talent tool in a health system with approximately 15,000 employees, including 800 physicians, ten hospitals and over $2 billion in revenue might seem like a daunting task. But for PeaceHealth – a not-for-profit Catholic health system – it was just one of the many changes it was facing. Moving from independent operating units to a single operating company, combined with several mergers and affiliations put Vancouver, Washington-based PeaceHealth in a unique situation.

The newly combined health systems were streamlining and standardizing operations and processes as well as moving a headquarters and service center to Vancouver. PeaceHealth had to ensure its employees – or caregivers as PeaceHealth calls them – continued to fulfill the system's mission of promoting health, relieving pain and suffering, and treating each person in a loving, caring way.

The leadership set about integrating technologies and standardizing processes. PeaceHealth wanted a streamlined, master system for performance management by 2013.

"New, talent-suite software would send a message to caregivers that we were invested in them," said Lynn Hunt, Organizational Development Consultant at PeaceHealth.

Evaluating HR solutions

Among the technologies in place at PeaceHealth were a new Lawson software suite and a homegrown performance management system built on top of a legacy Infor Infinium HCM product. PeaceHealth wanted better functionality for aligning goals, reporting on performance and delivering an improved user experience.

PeaceHealth's goal functionality amounted to an online form within which caregivers input text and the system locked the data

until the next review cycle. There was no way to set SMART goals, or easily monitor a caregiver's progress against goals. Data reporting on goals, performance ratings or assessment progress was extremely limited.

After issuing an RFP for talent and performance management systems, PeaceHealth chose SAP SuccessFactors' Performance & Goals solution along with the Recruiting Management tool. SAP SuccessFactors also recommended that PeaceHealth turn to 3D Results (3DR) for the design and implementation of SAP SuccessFactors' 360-degree assessments, employee profiles, goals and performance and recruiting products along with putting together a performance management strategy.

Taking a collaborative approach

In 2012, 3DR co-founder Brian Fieser and senior consultant Karl Schmitt engaged with PeaceHealth to focus on the design of the performance management process. Fieser and Schmitt, both consulting psychologists, helped PeaceHealth consider how to put in place a design that would align the hospital system's strategy and culture for better results.

Hunt adds, "3D Results brought best practice knowledge and facilitated some of the thinking around our standardization."

With the move toward one PeaceHealth, leaders wanted to instill a new expectation of how caregivers should work. There were questions about attributes and how caregivers would meet those expectations.

"3D Results provided guidance and helped us come together as an organization to decide how we wanted our performance management tools to look and feel," adds Hunt.

The 3DR team configured both talent and recruiting modules within the SAP SuccessFactors suite. And 3DR analyzed the current and future state of PeaceHealth's talent and recruiting processes, while addressing the delta between them.

Collaborating and delivering benefits

"We learned that with a 3D Results implementation, the difference is the collaboration," said Hunt. "We knew they were in this with us. One of our core values as an organization is collaboration and we wanted a partner who shared that perspective."

PeaceHealth also asked 3DR to conduct a change management workshop in February and March of 2013. Vicki Kwarciany, a senior principal consultant

for 3DR and an industrial organizational psychologist, met with PeaceHealth to understand its culture. This led to two workshops. The first focused on implementing the new process for performance reviews; the other facilitated the mapping of PeaceHealth's talent processes and talent calendar.

"The PeaceHealth participants walked away from the change management workshop with the elevator speech for why this change is critical for them and the organization," says Kwarciany.

Deliverables, according to 3DR, included a stakeholder analysis, which helps change-agents know what they'll say and a risk analysis. The risk analysis showed the organization's competing priorities and the odds of people – who were focused on the SAP SuccessFactors project – being pulled away to manage other initiatives.

Kwarciany recalls, "People from the performance management project team, call center, hospital nurse managers and those designated to take questions about the SAP SuccessFactors rollout needed to see the competing interests."

Linking an organization's leaders throughout the design phase to ensure visibility throughout the project is part of what 3DR calls its Process on Purpose® methodology.

"It was really helpful for setting us up for a successful implementation," adds Hunt. "Through the development process we were able to see that we wanted the review process to be a dynamic part of a caregiver's experience, not an awkward, once-a-year event," says Hunt.

A streamlined solution proves a better business outcome

By June 2013, 3DR and the PeaceHealth performance management team led by Hunt launched the hospital system's first assessments via SAP SuccessFactors.

The new technology implemented by 3DR helps PeaceHealth ensure it has the right people with the right skills in the job. "Goals and performance aren't viewed as a punitive measure," says Hunt. "We are measuring a person's ability to deliver care, so we can all achieve our mission."

With SAP SuccessFactors, 3DR and PeaceHealth opened up the potential for a year round performance-goal management process. The implementation brought standardization to the system's performance management process. And 3DR enabled PeaceHealth to leverage the SAP SuccessFactors tool so that front line caregivers could receive feedback from those they worked

directly with each day. Implementing SAP SuccessFactors, says PeaceHealth managers, has given the health system a better measure of a caregiver's technical ability to deliver patient care.

With the Performance & Goals solution, caregivers and managers can now align their goals with PeaceHealth's business objectives as well as deliver 360-degree assessments. From dashboards, managers can see assessment completion status, goal progress, and distribution of ratings. The Recruiting tool simplified administrative tasks for PeaceHealth, so caregivers could focus on recruiting to fill skill gaps and identify future needs.

"With dashboards in the system, reporting is instantaneous for administrators," says Hunt. "And we can track progress in real time."

The SAP SuccessFactors software replaced the limited, once-a-year process with an ongoing mentoring model where managers and caregivers focus on goals such as patient rounding or improving HCAHPS scores, which shape the patient experience. According to PeaceHealth, how valued caregivers feel and their ability to serve the mission of the organization translates into the care they provide patients.

"Our goal is that our patients and caregivers feel cared for, even if that touch is through technology," says Hunt. "That is the lens we use to design any interaction."

"I don't think we would have met our timeline or been successful in the communication and training plan and change management process without 3D Results," says Hunt. "I would highly recommend 3D Results to any other organization considering an SAP SuccessFactors implementation." ◼

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