

Engagement and communication – the foundations for migration success



Central and North West London NHS Foundation Trust

Building strong relationships and delivering a comprehensive engagement plan to successfully migrate one of the UK's largest Trusts, with over 150 sites, to a new finance and accounting, and procurement system.

The challenge

Having been awarded five-year contracts to provide both a finance and accounting service and operational procurement, NHS Shared Business Services (NHS SBS) faced migrating 1,500 users at the Trust across a diverse range of sites onto the new systems over an eight-week period.

The solution

Recognising it was essential that all users were aware of NHS SBS, how the changes would benefit the Trust, and importantly, the benefits that individual staff members would gain from the new systems, NHS SBS established a large-scale engagement and communications programme supported by the Trust's senior team.

Initially, NHS SBS looked beyond the core stakeholder group - the finance team - and identified all other stakeholders within the Trust, grouping them according to the type of work and level at which they would be using the new systems – for instance requisitioners or clinical system purchasers.

A communications and training programme was then implemented, tailored to the needs of each stakeholder group and aimed at fostering a partnership approach between NHS SBS and the Trust's staff where the joint goal was to achieve a successful migration.

- 30 roadshows were held across 17 of the larger sites, supported by the Trust's finance team who introduced NHS SBS to staff.
- NHS SBS highlighted the benefit of giving the project a clear identity. This resulted in the Trust's project group creating a

Key points

Client:	Central and North West London NHS Foundation Trust
Project:	Migrating 150 sites onto new finance and accounting and procurement systems
Timeframe:	Five and a half month migration programme
Result:	Migration completed successfully within the timescale employee satisfaction

'Better Buying' logo depicted by an image of a shopping trolley, which was then used across all migration communications.

- Process awareness sessions were delivered in advance of training beginning the following months. These sessions played an important role in explaining the relevance and importance of the forthcoming training and helped build the relationship with NHS SBS.
- Given the scale of training 1,500 users across the 150 sites, NHS SBS established various training routes – from classroom and 1-2-1 training through to webinars. The training needs were then prioritised. For instance, classroom training was provided as a priority to those responsible for processing clinical orders.
- Webinars were recorded and are available on the Trust's intranet for staff to use as a reference guide once migration had completed.
- NHS SBS selected 22 business champions within the Trust, individual employees who were keenly supporting the migration. The business champions were provided with additional training and became the internal go-to experts



among their colleagues for simple problem-solving.

- NHS SBS also established a robust stakeholder management process to help overcome any reticence towards the changes and build rapport and trust. Members of the NHS SBS team would communicate daily with anybody who felt this way, usually through a 15-minute phone catch-up which enabled people to discuss any concerns or challenges they were facing.
- The support of the Trust's senior team for the project was also visible throughout the process, including a number of staff communications being sent out directly by the Director of Finance.
- Members of the NHS SBS team were on-site and available to answer queries on the days that individual sites went live.
- A robust post-implementation support system was established. A generic email address for queries was manned by CNWL. Queries were either directed to the project staff on-site or NHS SBS, where 'go to assist' software enabled the NHS SBS operative to see the screen and solve the query remotely. This process freed up time for the NHS SBS process expert to continue up-skilling the Trust's finance team to ensure they were self-sufficient after the migration period had ended.

The result

- The thorough communications and engagement process paid dividends. It resulted in high numbers of people attending the training sessions as they were aware of NHS SBS and understood the relevance and importance of attending.
 - The business champions and stakeholder management approach smoothed the process, anticipating any resistance to the changes and identifying and solving problems before they could escalate.
 - The visible support of the Trust and the whole partnership approach created a team culture of: 'We're working jointly towards the same goal,' which came into its own when challenges arose.
 - Migration was completed successfully within the timescale.
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