

Case study

Industry sector:
healthcare

Holistic approach helps health authority achieve its goals

BT transformation roadmap sets West Midlands South Strategic Health Authority on the road to measurable service improvements

Executive summary

As part of the nationwide NHS Plan, West Midlands South Strategic Health Authority (SHA) needed to take a more holistic approach to implementing change, in order to realise tangible benefits such as improving service standards and increasing patient choice. Having defined its high level vision, the SHA found it difficult to identify the specific outcomes it wanted to achieve.

BT used its Business Transformation approach to help the SHA to clearly state its goals for each area of operation and express these as specific outcomes or benefits. BT incorporated these outcomes into a transformation roadmap that includes key outcomes from the NHS Plan, and policy documents such as National Service Framework (NSFs).

The transformation roadmap has enabled the SHA to precisely define its objectives. By creating order from a chaotic multiplicity of targets and policies, the roadmap gives the SHA a firm basis on which to achieve its goals by 2010. Necessary projects and activities, or areas of potential conflict, are now easier to identify because staff have a better understanding of the wider context. For the first time, West Midlands South SHA has a clear overall picture of everything it must achieve, helping it to deliver substantial benefits to the community it serves.

“BT has helped us to look beyond our usual short to medium-term planning horizons and to think in a more transformational and challenging way about the outcomes that our organisation wants to achieve over the next eight years, while also placing in context the outcomes required of us by the NHS Plan.”

Mike Marchment
Chief Executive
West Midlands South SHA

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“We now have, for the first time, one shared picture of our extended organisation’s future. This provides a robust basis on which to plan our future programmes of work, and ensure that the Strategic Health Authority delivers real and lasting benefits to the community. It is also essential to successful future engagement with potential local service providers.”

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Marketplace

The challenge facing the NHS is to modernise and reform the organisation to meet increasingly high public expectations and give people a health service fit for the 21st Century. However, health authorities can find it difficult to navigate the shifting and fragmented landscape of policies, plans and targets.

West Midlands South Strategic Health Authority (SHA) is responsible for ensuring the provision of healthcare to 1.55 million people in Warwickshire, Coventry, Worcestershire and Herefordshire. It recognised the need to think differently about the issues it faced and take a more holistic and joined up approach to achieving significant change and realising tangible benefits.

Business opportunity

West Midlands South SHA’s management team had already defined a high level vision for the organisation: “To deliver the NHS Plan in a way which addresses inequalities, values diversity, is within the resources available and contributes to building healthier communities”.

The NHS Plan, the most far-reaching change to healthcare in Britain since the NHS was founded, seeks to redress geographical inequalities, improve service standards and increase patient choice. At the heart of West Midlands South SHA’s vision – in line with the NHS Plan – was the need to transform patients’ experience, putting them at the centre of healthcare by building the capacity of local organisations to deliver the modernisation agenda.

However, the SHA had not defined what this meant in terms of the specific outcomes it wanted to achieve over the long term. Without that clear articulation, it would be difficult to identify what needed to be done to realise the vision. It would also be hard for BT – or any other local service providers – to correctly identify how, where and why to apply networked IT services solutions to support the SHA’s local delivery plan.

BT solution

BT's Consulting & Systems Integration team began working with the SHA's senior management to identify the strategic objectives on which the organisation would have to focus in order to deliver its vision. To do this, BT used its formal Business Transformation approach which is designed to help organisations think clearly about their long term goals and develop a single, shared picture of the future.

Taking the SHA's high-level vision as a starting point, BT used a series of facilitated workshops to define the outcomes that would demonstrate the organisation's achievement of each of its strategic objectives by 2010, the timescale set out in the NHS Plan. These outcomes were captured in a tool called a transformation roadmap, including all the key outcomes from the NHS Plan and other policy documents such as the National Service Frameworks (NSFs) – which relate to the reform of services, procedures and workforce structures within the NHS.

A key feature of BT's approach is the expression of outcomes as benefits sought rather than tasks to be completed. One of the issues identified at the workshops was the number of separate policy initiatives being progressed in the different functional areas of the SHA. For example, there was a separate stream of work relating to the implementation of each NSF. By incorporating all the relevant data into the transformation roadmap, BT enabled West Midlands South SHA to have, for the first time, a clear overall picture of everything that it must achieve by 2010.

A transformation roadmap is not built as a 'one off' exercise; it evolves over time. With West Midlands South SHA a large part of the roadmap was developed over two workshops, but significant additional input came from specialists and review meetings. "BT's Business Transformation approach has enabled West Midlands South, as a new SHA, to think widely and clearly about its long-term vision and direction," says Mike Marchment, Chief Executive of West Midlands South SHA. "Working with BT has been an engaging and provocative experience and one that our organisation has found very helpful."

Why BT?

- BT's ability to provide a proven framework for business transformation
- BT's specialist knowledge of the business transformation process
- BT's understanding of, and experience in, the healthcare sector
- A relationship based on trust that enabled West Midlands South SHA to achieve its goal of taking a more holistic approach to change management in line with the NHS Plan

Results

Although some of West Midlands South SHA's objectives were self-evident – those that relate to the delivery of care – it soon became apparent that other important underpinning objectives concerning the development of the workforce and delivering value for money had never been considered. By defining all its objectives very precisely, the SHA was able to ensure that these were clearly understood and the results measured accurately.

Once completed, the transformation roadmap showed West Midlands South SHA a consistent view of the future, creating order from a chaotic multiplicity of targets, objectives and policies, and giving the organisation a firm basis on which to plan the streams of work required to achieve its vision. Necessary activities and projects, for example, are now much easier to identify because staff have a better understanding of the wider context.

Mike Marchment explains: "BT has helped us to look beyond our usual short to medium-term planning horizons and to think in a more transformational and challenging way about the outcomes that our organisation wants to achieve over the next eight years, while also placing in context the outcomes required of us by the NHS Plan."

In the same way, it is now possible to identify areas of potential conflict and take steps to resolve them. The SHA can also make its own interpretation of

national policy targets, for example, by identifying that it will seek to achieve a particular teenage pregnancy outcome sooner than mandated.

Mike Marchment concludes: "We now have, for the first time, one shared picture of our extended organisation's future. This provides a robust basis on which to plan our future programmes of work, and ensure that the Strategic Health Authority delivers real and lasting benefits to the community. It is also essential to successful future engagement with potential local service providers."

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Technology blueprint

The Business Transformation approach used by BT is based on first developing a roadmap for what an organisation wants to achieve across its areas of operation, expressed in terms of the business outcomes or benefits that it wants to achieve. A resulting programme plan for achieving desired change is then developed that includes all key implementation themes – for example, organisational mobilisation, change management, process change, networked IT services, governance and finance – and links each project clearly to the business outcomes it will deliver.

The BT approach enables organisations to:

- Establish their vision and key strategic objectives, thinking beyond current planning horizons
- Identify the interim objectives required in order to ensure that long term strategic objectives are met
- Use this robust picture as the basis on which to plan future work, resulting in programme plans that clearly link projects to objectives and consider all elements including organisation and people, process, technology and assets
- Ensure that all work being carried out is clearly targeted at reaching strategic objectives and realising the intended benefits
- Oversee the programme plan in an holistic way, managing conflicting resources and timescales with a clear and common understanding of the bigger picture and adapting the programme plan if the vision and drivers change
- Communicate and cascade the vision from the top team down through the organisation and to other stakeholders
- Realise significant transformation with reduced risk, more effective use of resources, and the commitment of staff around a common purpose

Main BT products & services

- BT's Business Transformation approach and consultancy services



Offices worldwide

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