

# Medtech Pre-implementation Toolkit: 5 Steps that Create Long-Term Value

The success of any new technology solution depends on the expertise of the individuals administering, maintaining, and using it. Medtech leaders should prepare their teams well in advance to reap the full benefits. This pre-implementation toolkit explores five essential steps for planning a cloud-based project, laying the groundwork for efficient deployment and long term value realization.

**STEP 1** Identify strategic objectives and establish KPIs

**STEP 2** Design a sustainable operating model

**STEP 3** Find opportunities to harmonize business processes

**STEP 4** Evaluate data readiness for eventual migration

**STEP 5** Engage users through change management efforts

## **STEP 1** Identify strategic objectives and establish KPIs

Before diving into implementation, medtech leaders should first discuss and define clear business objectives, including their **core quantitative and qualitative value drivers**. These typically fall into three main buckets: growth, cost, and quality. Will this new solution help get products to market faster? Will it bring down overhead costs or better utilize existing assets? Can it reduce risk and help improve the employee or customer experience? Answering those questions is key to understanding the “why” behind the project before focusing on how to achieve those goals.

### **UNDERSTANDING VALUE DRIVERS**

Will this new solution help get products to market faster?

Will it bring down overhead costs or better utilize existing assets?

Can it reduce risk and help improve the employee or customer experience?

Once business objectives are clear, the next step is establishing KPIs that enable leadership to measure attainment, gain performance insights, and demonstrate the value of the IT investment at

all levels of the organization. For example, setting robust adoption KPIs can help track technology uptake within the organization and highlight problem areas that may detract from core value drivers.

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## STEP 2

### Design a sustainable operating model

It's important to consider roles, responsibilities, and timelines to ensure the project runs smoothly. Designing and implementing a right-sized operating model connects strategy and execution to align moving pieces and drive desirable business outcomes.

Work with a core team to develop an operating model showing how each group will support the business objectives. The operating model should also detail how the technology solution will meet business needs and deliver value to stakeholders throughout the implementation process and beyond.

One of the best ways to drive competitive advantage in the medtech industry is to involve IT in business decisions. Think about ways to **bridge the gap** between departments and align on financial value, strategic capabilities, and the organizational technology roadmap. As Dave Hohler, senior director

of global technology solutions at top ophthalmic medical technology company Glaukos, says "It's so important for projects to have a steering committee working with the senior management team. Communication is essential amid constantly occurring shifts due to customer assessments or impacts."



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**Dave Hohler**

Senior Director of Global Technology Solutions  
Glaukos

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## STEP 3

### Find opportunities to harmonize business processes

Your core team will also be critical in **assessing existing business processes** and how they'll be impacted by new technology. Be sure to focus on differences across business units to identify pain points, areas for optimization, and potential risk.

The core team should begin by analyzing existing documentation and data to understand workflows

and communication channels. This assessment should include input from representative business units, functions, and geographies. It should also be positioned as an opportunity to reflect on pain points and opportunities.

Then, this interdisciplinary team should apply these inputs to design a future state where business

processes are harmonized and streamlined across divisions. Once there is a clear future vision, consider which processes can be automated and which areas should be prioritized to maximize positive impact.

It's important to strike the right balance between standardization for consistency and flexibility to

accommodate specific business needs. Companies should prioritize standardizing processes prior to tailoring systems to meet the specific needs of different divisions and regions. Developing a shared vision establishes a foundation for how the system will be used post-implementation and creates opportunity for future customization to scale as business needs change.

#### STEP 4

### Evaluate data readiness for eventual migration

Bringing forward complete and accurate legacy data to the new cloud based system is a critical component of a successful digital transformation. To ensure a smooth migration, planning activities should start well before new technology is implemented. Leaders should work with business and IT stakeholders to inventory data and

documentation, understand ownership, and assess the completeness of this information. This assessment will allow the organization to make informed decisions during requirements gathering and more effectively close data gaps in the new single source of truth.

#### STEP 5

### Engage users through change management efforts

Change management is notoriously difficult for cloud technology projects as **digital systems require fundamentally new skills and ways of working**. But by openly engaging stakeholders to create awareness for change rationale, set expectations, and create feedback opportunities, medtech leaders can get ahead of any resistance and help users master those new digital competencies.

Consider establishing a **change champion network** between the core team and end users to ensure accountability, provide support, and reinforce expectations. Focus on ways to communicate key information including cadence, channel, messaging, and audience. This could range from formal, highly planned leadership messaging like town halls to informal channels like emails and self-service reminders to reach people at different points of the implementation process.

**These are the basic building blocks for a successful technology implementation and can be customized to meet various business goals. For additional support based on specific needs, **Veeva Business Consulting** has a team of experts ready to help.**

