

EVALUATION GUIDE: HOW TO CHOOSE THE RIGHT POLICY MANAGEMENT SOLUTION

Best practices for high-touch customer support that increases implementation, use, and ROI in policy automation solutions

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INTRODUCTION

Automated policy management solutions have become an indispensable part of running an efficient, successful organization. Organization leaders have turned to automation technologies to better manage massive volumes of documentation, data analysis and security, and meet evolving compliance standards.

Yet, like most software solutions, the products are only as good as the support behind them. Nearly 75% of today's workers want more training and support for the tools and systems they use daily, whether it's provided by their employer or by a vendor.¹

Board of directors and executives set the tone for the rest of the company, emphasizing a commitment to compliance and ethics.², it is imperative that industry leaders establish relationships with vendors whose services include extensive implementation and post-implementation support and training to drive adoption, higher usage, and maximum return on the investment.

This guide will provide all the information you need to evaluate policy software vendors' onboarding and customer support experience services to ensure you're partnered with the best choice for your organization.

¹Gutierrez, Karla. "10 Statistics on Corporate Training and What They Mean for Your Company's Future." www.shiftelearning.com. January 28, 2016.

²U.S. Department of Justice Criminal Division. Evaluation of Corporate Compliance Programs. Updated March 2023.

A woman in a blue blazer is holding a tablet computer. The background shows a blurred office environment with a bookshelf and a desk with a laptop and papers. The text is overlaid on the left side of the image.

CHAPTER 1

**SO MANY DOCUMENTS,
SO LITTLE TIME**

It's no secret that the state of many documentation management leaves much to be desired across all industries. Organization leaders face an increasing number of challenges when trying to gain efficiency in their policy management operations, such as:

Sifting through the paper trail

Despite the fact that we're working in the digital age, many organizations continue to store policies and procedures in unwieldy, physical binders that make searching and referencing information laborious and time-consuming. Not to mention that maintaining up-to-date records to reflect any and all changes to policies and procedures becomes extremely challenging when your team is chasing a never ending paper trail.

THE COST OF NON-COMPLIANCE

- The cost of non-compliance is more than twice that of compliance costs
- Healthcare: Up to \$1 million for inaccurate or untimely reporting to CMS
- Universities and Colleges: Total annual cost of compliance in higher education is approximately \$27 billion²

³ Vanderbilt University. The Cost of Federal Regulatory Compliance in Higher Education: A Multi-Institutional Study. An assessment of federal regulatory compliance costs at 13 institutions in FY 2013-2014. October 2015. <https://news.vanderbilt.edu/files/Cost-of-Federal-Regulatory-Compliance-2015.pdf>

Cybersecurity risks

Electronic document management provides opportunities to boost efficiency, but at what cost? Without proper attention to IT security, digital information theft leaves organizations wide open to ransomware and compliance-related issues.

Duplication errors & Information silos

Many, if not all, organizations work within highly specialized silos, so it's no surprise that data, policies, and procedures inadvertently wind up being stored in independent silos. As a result, locating policies and tracking employee compliance can result in a maze with more dead ends than connection points. Who knows how much time an organization is wasting on futile searching in the wrong silo and the unknowing duplication of policies and procedures.

Cacophony of compliance

Compliance regulations on top of compliance regulations. Each year an untold number of new laws and requirements need to be incorporated into your organization's established workflows. Each regulation requires separate policies and procedures—a recipe for adding hundreds of pages of documentation.

Beyond just the increasing compliance regulations and security risks, the challenges that arise from a combination of manual and electronic document management leaves the majority of organizations and their teams exhausted and in dire need of a more efficient policy documentation solution.

A photograph of two men in business attire sitting at a table. The man on the left is looking at a tablet computer he is holding. The man on the right is looking at the tablet. There are papers and glasses on the table. The background is a blurred office setting with windows.

CHAPTER 2

WHY YOU NEED POLICY MANAGEMENT SOFTWARE IN THE FIRST PLACE

The complexity involved with policy management demands that organizations automate as many processes and tasks as possible because of how time-consuming manual document management control can be.

From regulatory compliance to updating workflows without interrupting existing processes, policy management solutions can dramatically reduce the frustration of never having enough time, manpower, or budget to properly manage massive libraries of documents. Partnering with vendors who have designed their solutions from a user-friendly standpoint can make operations even smoother, because they're purpose-built to the needs of any type of organization.

In particular, policy management software helps:

- Streamline policy management control with auto-archiving and other features
- Enforce policy version control
- Automate policy approval workflows
- Achieve staff compliance through policy updates and universal access to the latest policies, procedures, and forms
- Execute competency assessments



CHAPTER 3

**POLICY MANAGEMENT
SOFTWARE SHOULD MAKE
JOBS EASIER, NOT HARDER**

It's estimated that up to 70% of technology projects fail to deliver their desired results⁷ because of poor requirements gathering, limited user engagement before the deployment, and inadequate training and materials availability after the software's launch.

Often, software that appears as simple plug-and-play style without a human touch, usually isn't, and leads to unrealistic expectations or unnecessary problems for the teams relying on it. With so much on the line every day, implementing any new process, software, or workflow can add an incredible amount of stress to your team and result in:

- Poor adoption rates
- Increased frustration throughout the organization
- Wasted investment
- Increased compliance risks

In short, just because you buy it, doesn't mean they will use it.

LIMITATIONS OF VENDOR SUPPORT SERVICES

- Limited free support and expensive upgrades for high-touch services
- Rely on customer self-service and frequently asked questions to troubleshoot
- Long response times and more transfers without role-based support
- Additional costs for supplemental training
- Lax service level agreements (SLAs)

⁷ "Don't Just Build a Solution. Get it Adopted." Rand Group, LLC. www.randgroup.com. Accessed August 3, 2017.

Complex tools require in-depth support

Today's policy management solutions are complex, with lots of moving parts and seemingly limitless possibilities for user and manager questions and challenges. Whether it's simple tasks, like resetting passwords and uploading documents, or something more advanced, such as creating workflows, there's no shortage of opportunities for user concerns to slip through the cracks and adversely impact their opinions and adoption of the software—wasting your investment and potentially leading to fines and penalties for falling out of compliance.

Restricted support

Some of that is due to the software vendors themselves, as support options for standard installs leave a lot to be desired. Free support is often extremely limited in scope and heavily reliant on customer self-service through frequently asked questions (FAQ) and searchable knowledge bases, while ongoing support is usually a premium service—sometimes adding more cost than a customer can or is willing to afford.

Unresponsive support

A more pressing issue is the lengthy response times to even simple inquiries, as many vendors either lack formal service level agreements (SLAs) or write them to be as lax as possible. The result is that customers often wait days—sometimes weeks—to have even basic inquiries addressed.

Superficial and short-term training

One of the most important factors that determines adoption and, in the end, return on investment, is the quality and depth of training. Most vendors offer an initial onboarding and training period to get both users and administrators familiar with the tools they need for their respective roles.

But additional or refresher training is usually a premium service and in cases of employee turnover, you can expect to pay a lot more to start the process over with new employees.

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CHAPTER 4

**GREATER ADOPTION, USE,
AND VALUE WITH HIGH-TOUCH
SUPPORT**

Even the best-built software is of little value if no one in your organization knows how or wants to use it. Software vendors that take the time and put in the effort to establish thoughtful, expansive support services are able to deliver greater value and longer lasting results than those with just bare bones offerings.

Policy management software evaluation must go beyond the bells and whistles of the solution itself and examine what life will be like post-implementation to see if it's the right fit.

What to look for in a vendor partner

Not all software vendors are created equal, reflected in how they approach the user experience both pre- and post-implementation. Here are a few key considerations when evaluating a new vendor partner.

- I. A user-friendly, intuitive website to minimize user confusion and maximize the chances of adoption and ongoing use.
- II. Offers user role-based access and security to simplify training and enable smarter allocation of training, support, and knowledge resources.
- III. Various support options including an expansive knowledge base, live multichannel (phone, chat, email) support, and convenient support hours.
- IV. Support is available across devices and platforms for maximum availability and faster time-to-resolution.
- V. Programs and strategies for keeping training and support resources up-to-date and aligned with customer needs.

A woman with short dark hair, wearing a black headset with a microphone, is shown in profile, smiling and looking towards the left. She is wearing a dark green, short-sleeved top. The background is a blurred office or call center environment with windows and cubicles.

CHAPTER 5

BEST PRACTICES FOR POLICY MANAGEMENT SOFTWARE CUSTOMER SUPPORT

A positive customer experience can make or break an investment in a high-value resource like policy management software. Software providers taking a customer-centric approach to support have built their engagement around these best practices:

Empathy

One of the most powerful tools in a customer service toolbox has nothing to do with software or computers; it's the ability to understand the frustration and pain a user is experiencing when he or she needs support. Putting yourself in the customer's position makes it easier to establish rapport, guide them through the resolution, and turn a potentially negative use case into a positive experience that keeps the user engaged and using the system.

Extensive internal knowledge base

Few things are more off-putting than calling in with a question only to be met with a wrong answer or none at all. Successful customer experience teams support each other through research, troubleshooting tools, and other resources, such as weekly team meetings and recorded calls that are reviewed for performance improvement. These resources help team members maximize their abilities to resolve customer issues quickly, properly, and for good.

One of the most powerful tools in a customer service toolbox has nothing to do with software or computers.

Continuous Improvement Processes and Ongoing Training

A well-educated and informed customer experience staff creates a well-educated and informed customer base. Policy management software vendors who emphasize continuous and updated training for their support teams boast better adoption rates, greater customer satisfaction, and deliver higher ROI for their customers.

Ongoing training should also extend beyond the internal support team to the customer's team as well. Specifically, employing a “train-the-trainer” model—in which the vendor trains the customer's administrators and managers—is essential for protecting against knowledge gaps and improving users' efficiency and confidence in using the various tools at their fingertips.

Strong Service Level Agreements

The value of answers to questions is directly proportional to how long it takes to get an answer. The most in-depth explanation in the world isn't worth much if it's delivered several days (or weeks) after being asked.

Successful policy management software vendors mandate faster response times—often within minutes—to customer questions. The quicker time to resolution alleviates a user's pain sooner, compelling them to keep using the system to its fullest capability and convincing their coworkers to do the same. Rapid response has the added benefit of eliminating costly and time-consuming re-training on system basics.

A group of four healthcare professionals, three men and one woman, are walking through a modern hospital hallway. They are all wearing blue scrubs and have lanyards around their necks. The hallway has large windows on the left side, and the floor is made of light-colored wood. The lighting is bright and natural, coming from the windows. The overall atmosphere is professional and collaborative.

CONCLUSION

**A HOLISTIC APPROACH
FOR SUCCESS**

When faced with making a major investment into a software solution, it can be tempting to try and go lean to cut costs and speed roll-out efforts — especially in light of how important policy management is in all industries.

However, it's vital to the success of any new software implementation that all stakeholders, regardless of the departments they represent, are fully bought in to the benefits of the solution and are given the appropriate training and ongoing support to keep them using it.

The goal should always be to maintain a balance between keeping your organization in compliance and running in an operationally lean manner -- which is why the research into a potential vendor's support capabilities and implementation procedures is as important as knowing the ins and outs of the software's capabilities.

End user and administrative support can truly be the difference in whether or not your investment in policy management software pays off. Nearly every vendor promises streamlined operations with automation technologies, but far fewer can back that claim up with a holistic approach to ensuring your team's success.

For more information about policy management software and a first-in-class customer experience, visit www.mcnsolutions.com.

ABOUT MCN SOLUTIONS

MCN Solutions is a leading provider of policy and document management software, policy and procedure content and compliance expertise for the healthcare industry. Our Policy Management software, fully customizable Policy Library, Regulatory Notification System, Learning Management System, and Contract Manager have been developed by experienced healthcare and regulatory compliance experts. Spanning several decades, our reliable, cost-effective web-based solutions have served customers globally, enabling healthcare organizations to achieve regulatory compliance, enhance patient safety, and avoid risk.



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