The Essential Role of Operational Engagement in Implementation

Driving Success: The Essential Role of Operational Engagement in Epic Implementation

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IT provides the tools.
Operations must adopt and own the change.

Governance · Readiness workstreams · Change agents · Leadership rounding · Workflow validation

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Executive summary: The critical role of operational engagement in Epic implementations

Epic implementations are among the most complex transformations a healthcare organization can undertake. While technology is a critical enabler, the real challenge lies in transforming operations and workflows to align with the new system. Success depends not just on technical go-lives, but on how deeply and consistently operations are engaged throughout the process.

Implementing Epic is more than just a software deployment. It's a full-scale operational transformation, impacting everything from clinical documentation and revenue cycle workflows to scheduling, patient communications, and quality reporting. As a result, achieving success hinges not only on IT readiness but on strong operational alignment, ownership, and engagement throughout the entire lifecycle of the project.

Change management is integral to this transition, guiding individuals and departments from current to future state workflows. This process includes communication strategies to keep all stakeholders informed, managing engagement and resistance, providing training and competency development, validating workflows, and ensuring sustained adoption and optimization post go-live. Without robust change management, even the most well-designed system can fail to achieve its intended outcomes.

Having Operations not just at the table but integrally involved can help you avoid pitfalls. Providing expertise in day-to-day workflows, rallying change, and providing iterative feedback, Operational involvement is like having a superhero on the team. Read more below to learn how to best leverage your Operational counterparts.

Why operational engagement is crucial

Reason	Why it matters
Subject matter expertise	Operational leaders and frontline staff are the experts in how work actually gets done. Their involvement ensures that Epic workflows reflect clinical and administrative realities, reducing the risk of disruptions at go-live.
Ownership of workflow redesign	Only operations can truly “own” the workflow changes that come with Epic. Engaging them early allows for realistic mapping of current and future state processes, buy-in for redesigned workflows, and empowerment of super users and champions.
Change sponsorship	Operational leaders serve as critical sponsors and advocates for change. When engaged, they can motivate their teams, model desired behaviors, and support accountability structures.
Risk mitigation	When operations are not involved, critical workflow nuances can be overlooked, leading to safety risks, inefficiencies, and user dissatisfaction.

Common pitfalls when operations are not engaged

Misaligned workflows due to IT-driven design

When IT teams lead design decisions without input from operational staff, the resulting systems often fail to reflect the realities of day-to-day workflows. This misalignment can create inefficiencies, force workarounds, and ultimately hinder the delivery of patient

care. Without the perspective of frontline users, even well-intentioned technology can disrupt rather than enhance operations.

Lack of clinician buy-in and poor adoption

Excluding clinicians and other end users from the planning and design phases often leads to a lack of ownership and engagement. When staff feel that a system was imposed rather than designed with their input, they are less likely to embrace it. This resistance can lead to poor adoption rates and widespread frustration, undermining the value of the initiative.

Inadequate training and preparation

Operational input is essential for understanding the training needs of different user groups. Without this insight, training programs may be too generic, miss key workflows, or fail to address specific concerns. As a result, staff may be ill-prepared to use new systems effectively, leading to confusion, errors, and decreased productivity.

Go-live chaos and disruptions

The absence of operational engagement can lead to an unanticipated breakdown in processes during go-live. Unforeseen obstacles often arise when users encounter scenarios that were not accounted for in planning or testing. This can cause major disruptions to care delivery, overwhelm support teams, and damage confidence in the new system.

Delayed ROI and unrealized benefits

One of the most significant consequences of limited operational involvement is the delay, or complete failure, of realizing the expected return on investment. Without achieving intended efficiencies, performance improvements, or user satisfaction, the initiative may fall short of its strategic goals. Operational insight is crucial to aligning technology with measurable outcomes.

Embedding operations in change management: key strategies

Governance structures that include operational leaders

A successful healthcare IT initiative starts with shared governance that gives operational leaders a strong voice at the decision-making table. Governance bodies should include representatives from clinical, administrative, and ancillary departments alongside IT and

project leadership to ensure decisions reflect operational priorities. These structures help prevent top-down mandates that may be misaligned with frontline realities and instead promote a culture of shared ownership. Regular meetings, transparent communication, and inclusive decision-making processes foster accountability and alignment across stakeholder groups, ensuring operational considerations are integrated from day one.

Operational readiness workstreams

Dedicated operational readiness workstreams ensure that the organization is fully prepared to absorb and support the upcoming changes. These workstreams should be built into the project structure with clear roles, timelines, and deliverables. Key outputs may include workflow validation, updated policies and procedures, staffing plans, and readiness assessments tailored to each department. By making operational readiness a formal component of the project plan, rather than an afterthought, it becomes possible to identify gaps early and provide the support needed to minimize disruption and promote smooth adoption.

Departmental change agents

Identifying and empowering departmental change agents, such as super users, champions, and frontline leaders, is critical for translating the project into operational success. These individuals serve as the bridge between the core project team and their peers, helping to localize the change, communicate updates, and provide hands-on support during training and go-live. Because they are trusted voices within their departments, change agents are instrumental in shaping attitudes, answering questions, and identifying workflow concerns early. Engaging them early and often boosts credibility, supports adoption, and builds internal capacity for long-term change management.

Leadership rounding and engagement

Leadership visibility and engagement are powerful drivers of successful change. Executives and operational leaders should conduct regular rounding, town halls, and huddles to reinforce the purpose behind the initiative, address concerns, and provide real-time feedback. Their presence signals commitment and accountability, helping to maintain momentum and morale. Active engagement also allows leadership to surface

unanticipated issues, adjust course when needed, and ensure frontline voices are being heard throughout the change process. Ultimately, visible sponsorship helps embed the initiative within the organization's culture and values.

Scenario-based workflow validation

Before a system goes live, it's essential to rigorously validate workflows through scenario-based testing that mimics real-life clinical and operational use cases. Involving operational stakeholders in integrated playbacks, simulation labs, and readiness drills helps ensure that workflows function as intended across departments. These exercises uncover issues that might not appear in isolated testing environments, allowing teams to refine workflows, adjust policies, and prepare staff. This kind of hands-on, realistic validation is one of the most effective ways to reduce risk, improve adoption, and build confidence in the system.

Conclusion

An Epic implementation is ultimately about transforming how care is delivered. While IT provides the tools, it is operations that must adopt and own the change. Operational engagement is not optional. It is the foundation for effective change management and long-term success. Organizations that invest in integrating operations throughout the implementation process are far more likely to achieve system adoption, user satisfaction, clinical quality improvements, and financial return on investment.

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How Spark helps

Spark helps health systems build operational engagement into their projects from the start. That includes governance models that give operational leaders a real voice, go-live readiness assessments, communications and change planning, at-the-elbow and adoption coach staffing, and backfill staffing during the transition. Together, our leaders have supported implementations across more than 100 hospitals and 5,000 clinics.

Planning an implementation? Start a conversation.