METHODIST HEALTH SYSTEM

Jerry Dugan
Director of Organizational Effectiveness

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Key Results

300	1	60K
Documents tasks documented for Workday	Just 1 Subject Matter Expert was needed to create the content	Times users have used Opus in first year

Highlights at Methodist Health

- Replaced existing Tools [Captivate, MS, etc.] in following the 70/20/10 principle

- Principle IT Applications include Workday, HealthStream, Cherwell and EPIC

- Lean L&D team: only had 1 Instructional designer for the Workday project to create and maintain content for Human Capital Management, Supply Chain and Finance

- Methodist Health have created ~300 documents supported by one SME to QA and create

- Users have use Opus 60,000 in first year

- Opus speed, control & consistency of all output content was key

Dallas-based Methodist Health System was founded by Methodist ministers and civic leaders, opening its first doors to a 100-bed facility on Christmas Eve 1927. Nearly 100 years later, MHS has 13 hospitals and care centers, almost 2,000 beds, 25 primary care clinics, 1,900 physicians and 10,000 employees.

In 2021, Jerry Dugan, Director of Organizational Effectiveness, was tasked with overseeing the production of all materials and content to support user adoption associated with their Workday implementation. The focus was on three functional domains: finance, human resources and supply chain management. Also, given the lean L&D team, he only had one instructional designer for the project.

Based on his deep experience, Dugan knew that generating the necessary content in the volume needed was going to be the stumbling block followed by the need to maintain that content over time due to changes in the Workday application. To be successful, he knew he had to select the right digital adoption tool.

Dugan developed a list of critical criteria:

- Ease and speed of use – his limited staff (started with 3, ended with just 1) required a tool that was super easy and fast to use for process recording, editing, QA and publishing
- Centralized content management – created content needed to be centralized to facilitate on-going maintenance due to frequent systems changes
- User access – had to be intuitive and simple (one click)
- Multiple formats – differing levels of user proficiency and preference require different help formats
- Workflow and Content management – incorporating SME's into the review process of content creation and maintenance required a system that coordinated workflow, notifications and content versioning.

Methodist Health assessed a variety of tools but seriously tested Walkme, Ancile uPerform and Epilogue Opus. Dugan stated "We listened to the advice of our System Integrator and tested several tools thoroughly and Opus met all the criteria and had the best cost/benefit ratio – we fell in love with Opus". Dugan added, The SMEs review in Opus and everything is version controlled in Opus. It was a paradigm shift that we embraced at our Workday Go-Live in April 2022, and we have planned extending Opus into our annual CME education grogram, in fact we already have all the key processes captured in our annual performance review using Opus."

Methodist Health was able to quickly implement Epilogue Opus and with just one Subject Matter Expert, was able to generate user help and guidance content for almost 300 Workday processes in time for their go-live in Q2 2022. In the year since launch, MHS users have used Opus 60,000 times, a testament to the effectiveness of Dugan's change management and communications. Looking forward with using Opus, there no restrictions to any other IT application at Methodist Health.

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The key to accelerating your digital adoption

Methodist Health had several Key Business Objectives including the following highlights:

Available to all users at their moment of need

Task guidance delivered in-app

Reduce time to proficiency in employees

Easy onboarding for new employees

Reflects actual deployed system and processes

No end user disruption