

# CBS Tools Engagement Program

Project Impact Report | February - July 2025

## Executive Summary

### **Rapid Deployment Success**

**Exceptional delivery under pressure:** The Clinic Business Solutions (CBS) team successfully designed, launched, and executed this comprehensive engagement program in just **5 weeks** (Feb 24 - Mar 31), demonstrating remarkable agility in program development, multi-channel marketing, member enrollment, and payment processing while maintaining high quality standards.

### **Project Success**

Successfully engaged 67 VDoFP physician members with business tools while efficiently utilizing \$118,232 in change management funds.

### **Strong Evaluation Response**

Achieved 96% evaluation completion rate (64 of 67 participants), providing comprehensive feedback data.

### **Valuable Data**

Collected comprehensive evaluation data on tool effectiveness and user experience for future improvements.

### **Member Value**

Participants gained practical business insights while being compensated for their time investment.

# Project Overview & Objectives

Metric	Value	Metric	Value
Total Participants	<b>67</b>	Business Tools Offered	<b>8</b>
Total Hours Available	<b>16</b>	Final Budget Utilized	<b>\$118,232</b>
Project Duration	<b>5 Months</b>	Total Tool Usage Instances	<b>292</b>
Average Tools per Participant*		<b>4.6</b>	

*\*Based on 64 completed evaluations from 67 total participants*

## Primary Objectives Achieved:

- Effective utilization of remaining 2025 change management funds
- Member compensation for participation in VDoFP initiatives
- Enhanced understanding of primary care business operations
- Collection of mass data on tool effectiveness

# Project Timeline & Milestones

Date	Milestone	Description
Feb 24, 2025	Project Launch	Completed project proposal, consent form, and marketing outline
Feb 28, 2025	Campaign Launch	Multi-channel marketing campaign initiated (FastFacts, Email, Slack, CNM Support)
Mar 21, 2025	Registration Deadline	Final date for physician participation enrollment
Mar 31, 2025	Payment Completion	All participant payments processed
Apr-Jun 2025	Tool Distribution & Evaluation	Tools distributed, demos conducted, evaluation forms collected
Jul 2025	Analysis & Reporting Complete	Evaluation data analysis and executive report development completed

# Business Tools Portfolio

Tool Name	Duration	Participants	Percentage	Description
<b>MOA Role &amp; Task Analysis</b>	1 hour	53	79%	Helps define MOA roles, responsibilities, and compensation structures
<b>Overhead Structure Decision Model</b>	1.5 hours	44	66%	Evaluation framework for different clinic overhead models
<b>Capacity Potential Analysis</b>	3 hours	38	57%	Space utilization and scheduling optimization analysis
<b>EMR Systems Comparison</b>	1 hour	37	55%	Comprehensive comparison of EMR features, costs, and implementation
<b>RN/LPN Business Case</b>	2.5 hours	36	54%	Financial analysis of hiring registered nurses or licensed practical nurses
<b>Financial Drivers &amp; Overhead</b>	3 hours	36	54%	Comprehensive financial planning and overhead management
<b>Environmental Sustainability Assessment</b>	2 hours	25	37%	Environmental impact assessment and sustainability planning
<b>Accessibility Assessment</b>	2 hours	23	34%	Clinic accessibility evaluation and improvement planning

# Participation Analytics

## Overall Engagement Summary

- **Total Participants:** 67
- **Evaluation Completion Rate:** 96% (64 of 67)
- **Total Participation Instances:** 292
- **Average Tools per Participant:** 4.6 (based on 64 completed evaluations)
- **Highest Engagement:** MOA Role & Task Analysis (79%)
- **Most Complex Tool Engagement:** Financial Drivers & Overhead (54% for 3-hour commitment)

### ★ Satisfaction Ratings by Tool

*Rated on a scale of 1-5 by participants*

#### EMR Systems Comparison

4.5/5

Highly valued comprehensive feature comparison

#### Environmental Sustainability

4.4/5

Appreciated practical sustainability planning approach

#### Accessibility Assessment

4.3/5

Valuable for compliance and patient care improvements

#### MOA Role & Task Analysis

4.2/5

Essential for staff role definition and compensation

#### Capacity Potential Analysis

4.0/5

Helpful for space optimization and scheduling

#### Financial Drivers & Overhead

3.9/5

Complex but valuable financial planning insights

#### RN/LPN Business Case

3.8/5

Detailed staffing analysis, needs simplification

#### Overhead Structure Model

3.5/5

Useful framework, requires refinement based on feedback

## Key Recommendations

- Continue offering high-satisfaction tools (EMR Comparison, Sustainability Assessment) with broader marketing
- Refine complex tools (RN/LPN Business Case, Overhead Structure) based on user feedback for better usability
- Develop follow-up resources for tools with longer time commitments to improve completion rates
- Consider creating a "Business Lounge Series" for peer-to-peer learning and discussion
- Implement regular tool updates incorporating real-world pricing and market changes
- Expand marketing reach through additional channels to increase participation in future iterations

## Future Considerations

### Tool Development Priorities

- **Update MOA compensation data** (most popular tool needs 2025 wage information)
- **Simplify complex financial tools** based on user feedback for better accessibility
- **Develop AI scribe comparison tool** (requested by multiple participants)
- **Create EMR demo functionality** for better decision-making support

### Program Expansion

- **Annual tool engagement programs** with updated content and new tools
- **Specialized tools for emerging models** (LFP, team-based care)
- **Peer learning opportunities** based on tool insights and shared experiences
- **Expand accessibility and sustainability** focus areas with deeper resources

### Innovation Opportunities

#### Technology Integration

Incorporate AI-powered recommendations, automated calculations, and predictive analytics into existing tools

#### Community Features

Build peer comparison tools, anonymous benchmarking, and collaborative planning features

#### Advanced Analytics

Develop real-time dashboards, trend analysis, and personalized insights based on clinic data

# Project Impact & Success Metrics

## Evaluation Methodology: Pre- and Post-Surveys

All participants completed pre- and post-surveys to capture expectations and measure changes in understanding of clinic operations, financial planning, and staffing. Post-survey feedback demonstrated increased clarity and confidence in operational decision-making, with many participants experiencing "aha moments" and stronger grasp of previously unfamiliar areas. The tools exceeded many physicians' expectations by addressing essential but unfamiliar practice management concepts.

## All Primary Objectives Achieved:

Objective	Status	Details
Change Management Funds Utilized	✓ <b>Complete</b>	\$118,232 successfully allocated
Member Compensation Delivered	✓ <b>Complete</b>	100% of 67 participants compensated
Mass Data Collection Achieved	✓ <b>Complete</b>	292 tool usage instances evaluated (96% response rate)
Tool Effectiveness Evaluated	✓ <b>Complete</b>	Comprehensive feedback collected from 64 participants

## Overall Project Assessment

The CBS Tools Engagement Program successfully achieved its primary objectives of utilizing change management funds while providing valuable business insights to VDoFP physician members. With 67 total participants and a 96% evaluation response rate (64 completed evaluations), the compensation-based model proved effective in driving participation. The comprehensive evaluation data collected will inform future tool development and improvement initiatives.

**Key Success Factor:** The remarkable achievement of delivering such a comprehensive initiative in just 5 weeks while maintaining high quality and achieving an average of 4.6 tools completed per participant (based on evaluation responses) demonstrates exceptional project management and stakeholder engagement.