Title: Getting Started Guide: The Role of the Executive Sponsor in Patient Portal Deployment

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Context for Use: This article is a guide to the role of the executive sponsor in the deployment of a patient portal.

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The Role of the Executive Sponsor: The executive sponsor is the executive team representative on the patient portal team, providing essential oversight of the project. The executive sponsor communicates vital project information to and from the full executive team, which is important in earning staff and provider buy-in. Because the portal deployment project is truly multidisciplinary, touching workflows in almost every department, the executive sponsor's organizational perspective is vital for setting priorities, resolving conflicts and making resources available to the project when necessary.

Choose a clinic executive leader who:
- Sees and can communicate the value of the portal to both patients and the clinic
- Understands the benefits and strategic drivers behind portal deployment
- Has the ability to set organizational priorities and resolve conflicts across departments
- Is aware of leadership priorities, clinic finances and ongoing or upcoming projects

When getting started, the executive sponsor should take these key steps:

1. **Establish project parameters.** Identify the range of organizational factors to be taken into consideration when planning your portal project. What are the goals for the first year of the project? What other projects will be competing for staff time and available funds? What portal features are most attractive to your patient populations? What portal features would be most attractive to your board of directors, executive team, providers, care teams and front line staff? The executive sponsor brings the organizational perspective about goals, objectives, constraints and opportunities to the project.
2. **Compose a project team.** Compose a multidisciplinary patient portal deployment team. As decisions will be required during deployment that impact providers, nursing staff, medical assistants, front desk staff, health information technology (HIT) staff, the marketing department and clinic executives those constituencies need to be represented on the team. The team should have the capacity to bring a focused effort to the first year of a portal project (launch or re-launch). Team members may change throughout the year when different phases call for different skills.
3. **Designate a project manager.** Designate a person to lead the patient portal deployment project. The project manager convenes the patient portal deployment team, manages the project plan, assigns tasks and oversees day-to-day project activities. The project manager provides regular status reports to the project team and clinic's executive team. Choose a project manager who has a deep and broad understanding of clinic operations and possesses the ability to communicate with leaders, providers, clinic managers, HIT staff and front-line staff. High-level understanding of HIT, including electronic health records (EHR) and portal systems, will also be helpful.
4. **Initiate project planning.** With the project team and project manager in place, it is time for the team to develop a detailed project plan within the organizational parameters developed by the executive sponsor. Whether for a launch or re-launch, a one-year focused time frame is most effective. Staging the portal project in this way allows tasks and activities to be broken down into manageable chunks. Establish metrics to define expectations for each stage of the project.
5. **Evaluate progress and encourage accountability.** Work with your portal vendor, HIT staff and the patient portal deployment team to develop a set of reports that will

show whether project objectives are being met and the project is on track. Reports should provide data to validate the effectiveness of each portal module at every stage of the implementation. When possible, data should be presented to show not only the numbers from a particular time period (usually monthly) but also progress over time (comparing monthly data over several months). Share selected reports with clinic executive leadership, the portal team and staff participating in the project. Use reporting to track enrollments, error reports, page hits, patient logins as well as use of each implemented functionality. Hold staff accountable if targets are not being met. In some cases, it may be necessary to change the project plan or assign additional resources to achieve project targets.