



DLG STRATEGIC

# **Guiding Principles for Strong Procurements: Building Capacity for Client Service**

**June 12, 2025**

**Have you ever  
wanted to give  
your team  
better tools to  
serve their  
clients?**



**Are your  
clinicians  
overwhelmed  
with paperwork  
and reports?**



**Are you looking  
for easier ways  
to manage your  
back office and  
make your data  
more  
actionable?**



**Micah Dalton**  
**Principal & Delivery Lead**

Twenty years of management experience in organization management, operations strategy & execution, financial analysis, procurement strategy and cost management, operations analysis and management, and root cause identification



**Grant Shivelight**  
**Delivery Lead**

Ten years of experience as program manager with a focus on contract delivery and a team-based approach to leadership



DLG has partnered with several other CSBs in the procurement and implementation of their EHR tools

|                                                                                                                                  | RFP Drafting/<br>Modification | Selection                                                                            | Process<br>Alignment                                                                  | Contract<br>Negotiation | Implementation                                                                      |                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
|                                                 | ✓                             | ✓                                                                                    | ✓                                                                                     | ✓                       | ✓                                                                                   | <br>Netsmart                 |
|                                                  | Customized                    | ✓                                                                                    | ✓                                                                                     | ✓                       | ✓                                                                                   | <br>Netsmart                 |
| <br>DANVILLE-PITTSYLVANIA<br>COMMUNITY SERVICES | Customized                    | ✓                                                                                    | ✓                                                                                     | ✓                       |  | <br>Streamline<br>HEALTHCARE |
|                                                |                               |  |  |                         |                                                                                     |                                                                                                                 |



# How do you know that you have a need a strategic investment?



**Staffing constraints** mean that every hour spent on admin has an impact on client service delivery



Documentation needs add **administrative complexity** through compliance requirements

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## Modernization efforts have impactful follow-on effects in several areas of operation:

- **Staff Recruitment & Retention** – a more efficient and user-friendly system maximizes time spent on client interaction & service delivery
- **Client Services** – both clinicians and clients benefit from efficiencies found in modern systems. Staff spend more time delivering services to a population that has an easier time accessing them

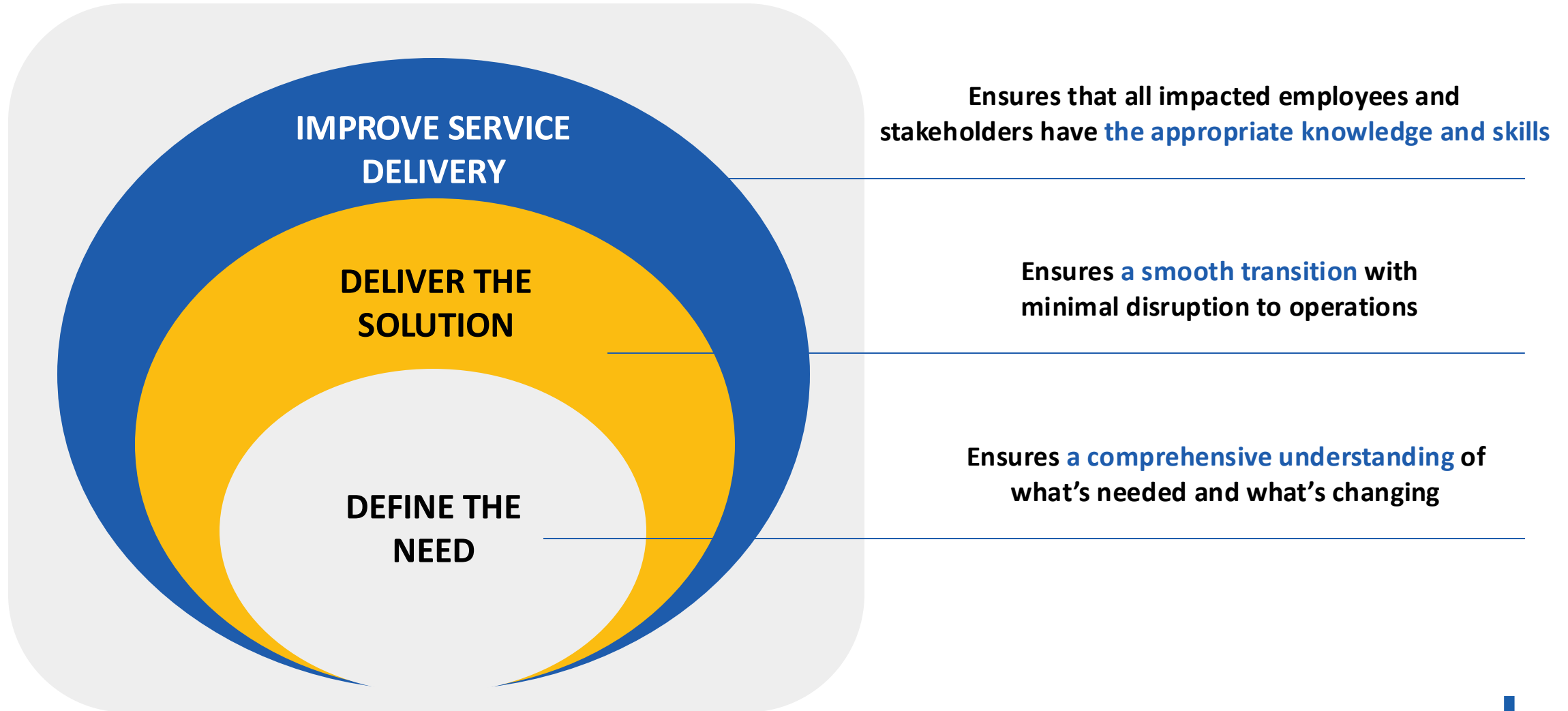
**“You don’t want the documentation to be more important than the people you serve.”**

Jim Bebeau, ED  
Danville-Pittsylvania  
Community Services



DANVILLE-PITTSYLVANIA  
COMMUNITY SERVICES

# Success is a combination of solving the right problem, effective implementation, and driving adoption with your team



# Finding the right solution: Don't buy the perfect solution...for someone else

## Guiding Principles



### FLEXIBILITY

There are multiple paths to success



### RESEARCH

Accurate information allows effective decision making



### DISCIPLINE

Solid business practice ensures good outcomes

## Making the Right Choice

- Understand the marketplace and available options – there may be many options, expenditures and levels of effort that meet your needs
- Accurately understanding level of effort and costs avoid budget misalignment
- Knowing your current workflows gives you a foundation to work from.
- Conceptualizing your future state requirements not only guides your evaluation – it opens pathways for improvement
- Systematic review makes determinations based on minimum functional requirements to ensure a best fit choice



# Leveraging expertise & capacity: Move beyond risk to prepare a foundation for successful adoption

## Guiding Principles



### IMMERSION

Deep understanding avoids binary choices



### PARTNERSHIP

Thoughtful guidance offers recommendation instead of ultimatums



### PLANNING

Preparation turns risk into opportunity

## Moving Beyond Mitigation

- Accurately understanding level of effort leads to appropriate resource allocation – gaps are identified before they effect program delivery
- Identifying capacity gaps guides decision making during implementation
- Detailed documentation of future state workflows provides the foundation for a successful rollout training program
- Systematic testing – referring to MVP requirements – provides confidence in the delivered product

Solidify Scope

Capture Workflows

Manage Development Cycle

Systematic Testing

Confident Acceptance

# Structured adoption: Engagement is more than just communication and training

## Guiding Principles

### CLARITY



Clearly communicated plans alleviate confusion & frustration.

### UNDERSTANDING



Know the impact the implementation will have – positive & negative.

### VALUE



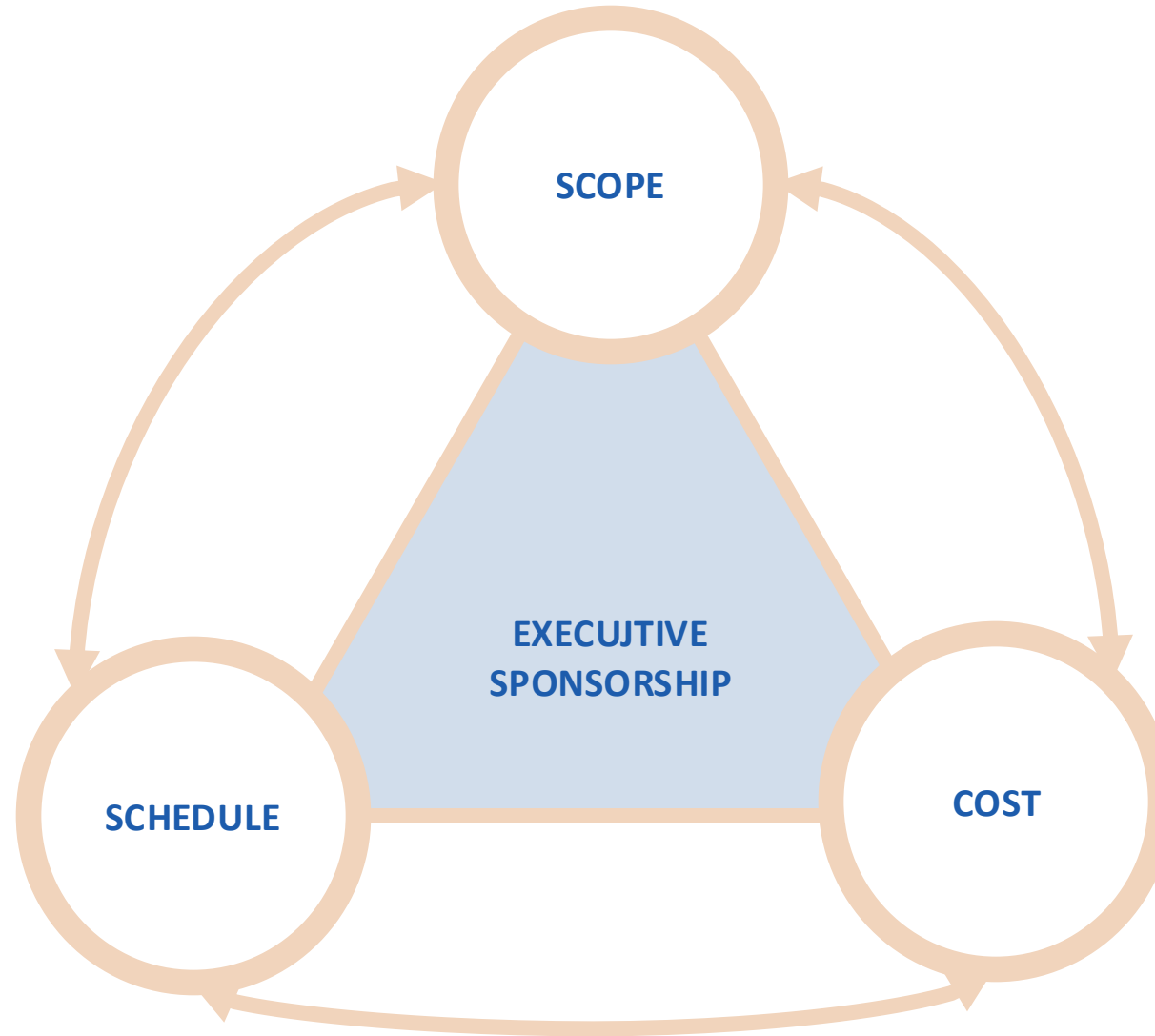
Sharing the benefits and value can propel implementation adoption.

## Effective Change Management = Successful Adoption

- A thoughtful communication plan that invites reciprocal contact and feedback can build awareness throughout the community of users in tandem with
- Clearly communicated project plans that drive reasonable expectations can build confidence in the project team and execution activities
- A thorough training program prepares teams by enabling effective knowledge transfer on how to successfully operate within new systems and workflows in the future state
- Demonstrating value is critical for change adoption and minimizing operational disruption
- An empathetic understanding of change and implementation impacts on existing teams can help the planning of a functional approach to an initiative rollout



## Program management most successful when there's strong sponsorship and alignment



## Consider reaching out when you find yourself looking for expertise or capacity



**Expertise**



**Capacity**

Reach out anytime if you'd like to talk more



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# DLG Strategic is a client-focused advisory and professional services firm specializing in leadership, strategy, and operations

## Our mission:

- Assist clients across the project and operations lifecycle to advance their strategic goals and solve business problems
- Balance planning and strategy with successful execution, while developing deep and trusted relationships

## How we work:



**Our approach is collaborative - we know from experience that the success we achieve together is a function of aligned values, honest conversation, critical listening, and consistent delivery on strategic priorities with high-quality service**

# DLG is a value-based firm



## Manage Polarities

We know that often what appears like competing interests are, in reality, interdependent activities, and organizations must embrace and maximize the value of each to achieve its goals. With this understanding, we avoid the trap of falling into binary decisions



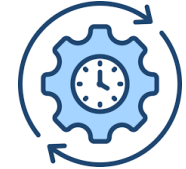
## Respect People

We believe that culture and the people that embody it may be the most important element of an organization; we ensure our solutions put your people first to maximize performance in your organization



## Excellence

We deliver on commitments and continue to earn the right to support our clients



## Consistency

We believe being consistent and fulfilling our promises allows our clients to plan on results