

Integrating Virtual Care: Change Management & Program Readiness Checklist

Successful virtual care programs are built on more than technology. They require thoughtful change management, clearly defined workflows, engaged clinical teams, and a shared plan for measuring impact. Use this checklist to assess organizational readiness before launching or scaling virtual nursing and other virtual care models across the enterprise.

Leadership & Governance

- Executive sponsor identified
- Program goals, priority use cases, and success criteria defined
- Cross-functional governance structure established, including clinical, IT, operations, finance, and quality stakeholders
- Policies and procedures updated to support virtual workflows

Clinical Workflow & Role Design

- Bedside and virtual role definitions documented
- Current-state and future-state workflows mapped
- Frontline clinical design group established
- Escalation pathways and handoff expectations between bedside and virtual teams defined
- Staffing coverage model validated

Communication & Adoption

- Patient/family communication plan created
- Manager talking points prepared
- Change champions or super-users identified
- Staff concerns, resistance points, and adoption barriers addressed

Training & Education

- Training plan for virtual and bedside staff finalized
- Continuing education cadence established
- Go-live support plan defined
- Post-go-live support channels documented

Technology & Operational Readiness

- Device placement, room readiness, and network requirements assessed
- EHR, communication, alerting, and task-routing integration needs identified
- Privacy, security, access, and technical support processes reviewed
- Downtime and contingency procedures documented

Measurement & Continuous Improvement

- Metrics and ROI measures identified
- Baseline performance data captured before launch
- Performance monitoring and shared reporting in place
- Post-go-live feedback cadence established
- Continuous improvement process established for optimization and scale-up

Use this checklist to identify gaps, align stakeholders, and prepare teams for sustainable virtual care adoption.

Explore what's possible with enterprise virtual care.
Learn more about Caregility's connected care solutions at [caregility.com](https://www.caregility.com).

