

TSG CONSULTING SERVICES PLAYBOOK

Healthcare organizations rely on their EHR as the backbone of clinical, operational, and financial workflows. Yet many hospitals and clinics find that simply having an EHR is not the same as using it well. Optimization requires the right consulting approach one grounded in real workflows, operational realities, and long-term sustainability.

This playbook is designed to help healthcare leaders understand what to look for in EHR-related consulting services and how to engage partners that drive measurable results across EHR optimization, DBA services, reporting, and data access.

01 START WITH WORKFLOW, NOT TECHNOLOGY

Effective EHR consulting begins with understanding how work actually happens across departments. Before recommending changes, consultants should:

- Observe day-to-day clinical, HIM, revenue, and IT workflows
- Identify bottlenecks, duplicate effort, and manual workarounds
- Understand staffing levels, shift coverage, and competing priorities

Clear, well-documented workflows create faster progress than complex technical designs. When optimization aligns with real-world operations, adoption improves and disruption decreases.

02 ALIGN CLINICAL, OPERATIONAL, & FINANCIAL TEAMS

Hospitals and clinics function best when IT, HIM, revenue cycle, and clinical teams share a common understanding of processes and goals. Consulting services facilitate alignment by:

- Translating technical concepts into operational language

- Ensuring reporting definitions are consistent across departments
- Clarifying ownership for data, workflows, and outcomes

Cross-functional alignment reduces rework, improves data trust, and accelerates improvement often without the need for new systems.

03 EHR OPTIMIZATION SERVICES: FOCUS ON USABILITY AND EFFICIENCY

EHR optimization should prioritize how efficiently teams can complete their work. Optimization services include:

- Streamlining registration, documentation, and order workflows
- Reducing clicks, alerts, and unnecessary data entry
- Improving patient access, check-in, and portal usability
- Supporting downtime readiness and continuity planning

Optimization is most successful when it is measured and supported by frontline staff education.

04 DBA SERVICES: PROTECT PERFORMANCE, STABILITY, & DATA ACCESS

Database administration is foundational to EHR reliability and performance.

Effective DBA consulting services includes:

- Database performance monitoring and tuning
- Index maintenance and query optimization
- Backup, recovery, and disaster readiness planning
- Secure data access for reporting and analytics
- Support during upgrades, implementations, and peak demand

DBA services should be proactive, not reactive — preventing issues before they impact patient care or revenue.

05 REPORTING & ANALYTICS: TURN DATA INTO ACTION

Hospitals and clinics generate vast amounts of data, but value comes from how that data is used.

Reporting services focus on:

- Standardizing definitions across clinical, financial, and operational reports
- Designing reports that align with decision-making needs
- Supporting regulatory, quality, and revenue cycle reporting

Consulting partners should help organizations move from data availability to data confidence.

USING THIS PLAYBOOK

Whether you are evaluating EHR optimization, DBA support, reporting services, or broader EHR-related consulting, this playbook provides a framework for asking the right questions and setting the right expectations.

Successful consulting partnerships are built on:

- Real-world workflow understanding
- Cross-functional alignment
- Practical, achievable recommendations
- Education-driven change
- Sustainable outcomes

HOSPITALS AND CLINICS THAT FOLLOW THIS APPROACH POSITION THEMSELVES NOT JUST TO OPTIMIZE THEIR EHR BUT TO STRENGTHEN OPERATIONS, IMPROVE CARE DELIVERY, AND MAKE BETTER DECISIONS WITH CONFIDENCE.

06 EDUCATION AND CHANGE MANAGEMENT ARE NOT OPTIONAL

Even the best technical solution will fail without education.

Be sure to include:

- Role-based training tailored to real workflows
- Clear documentation and reference guides
- Knowledge transfer to internal teams
- Ongoing support during and after go-live

When teams understand the “why” behind changes, adoption increases and improvements last longer.

07 MEASURE SUCCESS AND PLAN FOR SUSTAINABILITY

Consulting services should deliver more than short-term fixes.

Hospitals and clinics should expect:

- Defined success metrics aligned to operational goals
- Clear handoff plans to internal teams
- Scalable solutions that support future growth
- Continuous improvement rather than one-time change

The goal is not dependency on consultant but capability within the organization.