



Walsh Purchasing Playbook

Chapter 1: Building a strong business case – Why you need Automation!

The first step in justifying any technology purchase is clearly describing the shortfalls and risks of your current processes. Remember, this is not a reflection on your team, but an honest analysis of the current situation.

Existing Process	Walsh's Solutions
Bad Documentation: Paper forms and spreadsheets lead to errors, delays, and missing documentation.	Complete Documentation: Using tablets and phones ensures clear and complete data input.
Inadequate Solutions: Current systems may not provide the reporting, analytics, or vendor support you need, leaving staff frustrated and data incomplete.	Cohesive Solution: Instant, accurate reports provide detailed insights effortlessly. Walsh's support covers training of new staff as turnover is inevitable.
Compliance risks: Gaps in inspections and follow-ups increase the risk of Joint Commission or CMS findings.	Always Compliant: Industry leading checklists ensure all your bases are covered, and follow-ups are completed.
Vendor accountability: Problems with outsourced services in EVS, Linen, and Pest lack documentation, making credits and improvements difficult.	Complete Documentation: Issues are fully documented with time stamps, notes and photos, providing the proof you need to implement process improvements or claim credits for inadequate service.
Lack of accountability: Current systems do not provide a clear, real-time view of performance and trends.	Full Accountability: Reports and dashboards paint a detailed picture of individual performance, trends and hot spots.

Examples of how the Walsh Suite Solves These Challenges:

- **QA Inspector:** Automates cleanliness inspections with standardized checklists and instant reporting.
- **Rounds Tracker:** Digitizes EOC rounds, captures issues in real time, and tracks all items to resolution.
- **Pest Control Manager:** Centralizes pest activity logging, chemical use, reporting, and ensures corrective actions are documented.
- **Linen Quality Tracker:** Tracks linen rejects, identifies trends, and reduces waste

DO THIS:

- Collect 3–5 real-world examples from your facility (e.g., missed inspections, a linen quality complaint, a delayed pest response, or inadequate follow-ups). Link each to how automation would have prevented or streamlined the issue.
1. Staff are not regularly completing inspections ...
 2. When we find a problem, I don't know if it was closed out correctly ...
 3. We are taking too long to address patient complaints ...
 4. Our last JC/CMS inspection resulted in the following findings ...
 5. Staff turnover requires ongoing training, and we don't have the resources ...



Chapter 2: Demonstrate Value to other stakeholders – gather allies

We know that Walsh’s solutions often benefit departments besides your own. For example, improved cleanliness will result in a corresponding reduction in patient and visitor complaints. In this case, the patient satisfaction team will see improved markers. While they are not directly involved in purchasing or using Walsh, they can become advocates for your case.

KEY STAKEHOLDERS TO INVOLVE:

- **Collaborators:** Nursing Leadership, Quality, Risk Management, Infection Control, Cost management, Patient Satisfaction.

TIPS FOR POSITIONING WALSH:

- Highlight; cleaner facility, reduced HAIs, quicker access to clean patient rooms, etc.
- Emphasize compliance readiness: Walsh tools and reports ensure you are Always compliant.
- Highlight efficiency: Less time on paperwork means more time on patient care.
- Vendor accountability: Linen rejects and pest logs are fully documented for negotiation and audit purposes.

DO THIS:

- Organize a Walsh demo for some of these stakeholders to build their understanding of the value of automation. Write a paragraph explaining how the various departments will benefit from automation of your quality systems.

Chapter 3: Preparing for IT reviews – What do you need?

Securing IT approval can be a challenging step. Providing a clear understanding of the offering and the correct documentation early on will streamline the review.

What IT Will Want to Know:	Walsh Provides:
Is the system cloud-based, and how is data secured?	MS Azure cloud infrastructure with data encryption and redundant backups
What type of data is being stored in this system?	No PHI or PII data is captured nor stored in the program
Is there any new equipment required?	No new equipment is required. Use existing phones, tablets, and computers.
What support will be required from the IT department?	No IT support is needed. Walsh handles system setup and configuration, on-site training and unlimited ongoing support.

DO THIS:

- Invite someone from IT to join your Stakeholder presentation (above). This gives them a great opportunity to understand the technology, and the simplicity of implementation and management.
- Request the **Walsh IT Requirements packet** and provide it to IT as soon as your project is under review.

Chapter 4: Preparing for Finance review – What documentation do you need?

Finance and Administration will expect clear evidence that this is a good investment. You should build a case around cost savings, cost avoidance and efficiency gains.

Cost Savings

- Better inspections means reduced re-work, which translates into less overtime
- Automation eliminates all your data entry expenses
- Complete documentation ensures vendor accountability, allowing you to claim credits for poor contractor performance

Cost Avoidance

- Dramatically reduce JC and CMS inspection preparation time with “Always Ready” reporting
- Avoid survey findings that can cost tens of thousands in penalties or lost reimbursements.

Efficiency Gains

- **Labor Savings:** Automating your inspections saves an estimated 10–15 staff hours per week, depending on your case.
- **Operational Efficiency:** Real-time dashboards give you the insight to make better use of your staff.

DO THIS:

- Work with your Walsh Account Executive to complete your **Walsh ROI Calculator**. This is a detailed analysis of your operational costs and how they will be impacted by automation. This is presented in a professional, easy to understand document.

SAMPLE JUSTIFICATION STATEMENT:

“Implementing the Walsh suite will reduce staff workload, improve survey readiness, strengthen vendor accountability, and reduce the risk of costly deficiencies. These efficiencies translate into measurable cost savings and improved patient safety outcomes.”

Chapter 5: Navigating RFP, RFQ and contract approvals – What should you expect?

Once your case is built, you are in a good position to submit your package. While processes differ across institutions, most follow these steps:

- **Requisition submitted** with supporting documents (business case, IT/security approval, sales quote). Starting out organized, with complete documentation highlights that you are serious and have done your homework.
- **Finance review** ensures the purchase aligns with budget priorities and timing.
- **Procurement review** examines contract terms, vendor compliance, and data ownership. Don't hesitate to contact Walsh for clarification on any issue.
- **Executive sign-off** is typically your "Go Ahead" to proceed with the acquisition.

DO THIS:

- Contact your procurement office to confirm which documents are required; this can avoid delays and unnecessary back-and-forth.



Chapter 6: Awarding the contract and preparing for roll-out.

With contracts signed, Finance will issue the purchase order – the green light to start implementation.

WALSH WILL ORGANIZE THE FOLLOWING IMPLEMENTATION STEPS:

- **Kickoff session:** Walsh will meet with your team to define project scope, roles, responsibilities, and outline the implementation plan. We will set a schedule to gather the necessary location and personnel data.
- **Schedule training:** We will schedule on-site training with Walsh's experienced team, covering all users on all shifts.
- **Go Live:** As soon as training is complete, we can go live, collecting data and tracking results. We will meet with your team at 30, 60, and 90 days to review progress, address issues, and ensure successful adoption.



Chapter 7: Reporting ongoing progress to senior management.

Your hospital's investment in automation requires time, capital, and trust. When you report your progress to senior management, you are accomplishing a number of important things;

- You show that you understand and use the technology
- You demonstrate that you are managing your team effectively, driving them toward continuous improvements
- You show that this was a wise investment, meaning you have good judgement and can be trusted in the future.

Here are a few things that you might want to report on:

- Number of inspections, rounds, linen checks, or pest logs completed vs. baseline
- Number of follow-ups, days to closure, and overall performance.
- Reduced deficiencies in Joint Commission or CMS surveys
- Improvement in HCAHPS scores related to cleanliness and patient safety

DO THIS:

- Schedule quarterly or semi-annual presentations with leadership to present progress, ROI and keep program visibility high.
- Notify Walsh Customer Support of your up-coming presentation, and we will prepare the reports you need.



Conclusion

Hospitals are under constant pressure to improve compliance, maintain safety, and streamline operations — all while protecting budgets.

Automating your Quality Management system is a proven and practical way to meet these demands while delivering measurable ROI.

While we hope that you find this Playbook helpful, rest assured that Walsh will be by your side. We have done this hundreds of times before, and we will guide you through this process.

Let Walsh help you succeed every step of the way.