

## A PRACTITIONER'S GUIDE

# The EPIS Framework

*Exploration • Preparation • Implementation • Sustainment*

The EPIS framework is a four-phase model for guiding organizational change. Each phase builds on the last. The decisions you make early determine what's possible later. This handout maps each phase to the questions you should be asking — and the behaviors you should be building.

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PHASE 1

## Exploration

This is your organizational functional assessment. **Function over topography.** The question isn't what does the new system look like — it's what does it need to do.

### QUESTIONS TO ASK YOUR TEAM

- ☐ What is our current process and what do we want to keep?
- ☐ What variables in our environment impact implementation?
- ☐ What are our must-haves for the new system?
- ☐ What are we willing to change?

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PHASE 2

## Preparation

You're establishing the antecedent conditions before the broader team touches the new system.

### QUESTIONS TO ASK YOUR TEAM

- ☐ Who will be part of our superuser team?
- ☐ How will we support our superuser team?
- ☐ How will we share information with impacted users to build buy-in?
- ☐ When is it feasible to go live?
- ☐ Who owns implementation decisions when staff push back?
- ☐ Who is the escalation point if something breaks down at week three?

### How to select your superuser team

- They understand the organization's current processes.
- They understand the organization's current pain points.
- They understand what problems you are trying to solve.
- They have the capacity in their workload to take this on.
- They have the credibility to pull colleagues along.

*Availability is not the bar. The right superuser changes behavior at the organizational level — not just learns a system.*

**3**

PHASE 3

## Implementation

You're establishing the antecedent conditions before the broader team touches the new system.

### Questions to ask your team

- ☐ How can we translate our current processes to the new system?
- ☐ What does internal support look like at go-live?
- ☐ What does training look like for new staff vs. current staff?
- ☐ What is the ongoing role of superusers post-launch?
- ☐ How are we measuring implementation fidelity?

*Superusers provide differential reinforcement during this phase — responding quickly when new behaviors show up correctly, and not letting old ones go unaddressed.*

**4**

PHASE 4

## Sustainment

Think of this as prompt fading at the organizational level.

### Questions to ask your team

- ☐ How can we continue to improve our processes?
- ☐ What problems are we still trying to solve?
- ☐ What features are we not yet utilizing?
- ☐ How do we ensure the adoption of new features across teams?
- ☐ What does ongoing training look like for new and current staff?

*New behaviors maintained only by external support will extinguish when that support fades. The system needs to contact natural reinforcers inside the organization — efficiency, better outcomes, reduced burden.*