New England Society for Healthcare Communications (NESHCO)


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Goals for today

- Appreciate and make the business case for collaboration in healthcare.
- Learn tools and tactics that improve collaboration and performance through an enhanced ability to influence and persuade others—especially across clinical and administrative roles.
- Put into practice a proven framework to better communicate and persuade others about your ideas.
Why are influence, persuasion, and collaboration skills so critical for today’s healthcare leaders?
First, let’s start with a working definition of effective collaboration...

Collaboration is a purposeful, strategic way of working:

- that **leverages the resources of each** party for the benefit of all
- by **coordinating** activities and **communicating** information
- within an environment of **trust** and **transparency**.

An increasing percentage of workers must collaborate in healthcare environments.

Adapted from “Thinking for a Living,” T. Davenport
Collaboration is important today and is expected to be even more important in the future...

Current Systems of CARE

Future System of CARE

*Adapted from Sg2*
Effective collaboration means higher organizational performance, better execution, and more adaptability.

Characteristics of companies indicating they are very capable of adapting to changing business conditions (Percent)


What Matters Most in Successful Execution

Information 54
Decision Rights 50
Motivators 26
Structure 25

Relative Strength (out of 100)

Key features of effective collaboration

Effective collaboration leads to higher returns.

McKinsey Study:
Organizations whose employees collaborate more effectively are more productive and outperform their competition.

Consistently higher average EBITDA per employee across a range of industries.

“Effective collaboration is an underutilized method to boost revenues, cut expenses, improve outcomes and use healthcare professionals’ limited time more effectively.”


But effective collaboration is easier said than done.

Organizations face considerable challenges in making alliances and collaborative partnerships work.

30-70% of alliances fail, meaning they:

- Do not meet the goals of their parent companies
- Do not deliver on promised operational or strategic benefits

50% of alliances terminate.

Yet, organizations need to form a greater number of alliances than before, and even rely on them as a way to enhance competitiveness and growth.

Why is this the case?

Prashant Kale and Harbir Singh, Managing Strategic Alliances: What Do We Know Now and Where Do We Go From Here? Academy of Management Perspectives, 2009.
#1—Politics

- 95% of all organizations are political to “some” extent. Nearly half are political to a “very great” or “fair” extent.*
- Political skills are the strongest predictor of performance ratings, outstripping by far both intelligence and personality traits.

* Sources: “How Frequent is Organizational Political Behavior,” Wickenberg & Kylen; “Political Skill at Work”
#2—Authority has limits

- “When you run General Electric, there are seven to 12 times a year when you have to say, ‘you’re doing it my way.’ If you do it 18 times, the good people will leave. If you do it three times, the company falls apart.”
- One study showed that “big” decisions required, on average, consultation with 20 people. “Little” decisions require consultation with eight.

*Short story—collaboration matters.*

“The age of the authoritarian CEO is over. [Chief executives] today need to have the whole range of ‘soft skills.’”

Source: Jeff Immelt quoted in Joe Nocera, “Running G.E., Comfortable In His Skin,” NYT, C1, 6/9/07.
Collaboration is particularly difficult inside healthcare organizations.

Research suggests that different functions/specialists “occupy different thought worlds.” Each thought world appears to be a complete way of thinking about a product.

<table>
<thead>
<tr>
<th>Function</th>
<th>What is the sense of task?</th>
<th>What is the sense of the product?</th>
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<tbody>
<tr>
<td>Technical</td>
<td>Hands-on, Tactile</td>
<td>A solution</td>
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<td>Sales</td>
<td>Relationship-based</td>
<td>Possibility</td>
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<td>Manufacturing</td>
<td>Operational</td>
<td>A well-built thing</td>
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<td>Planning</td>
<td>Abstract</td>
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Influencing and persuading: Case Study #1
Influencing is a four-step process.

1. **Survey your situation:** What is my idea, and how is it better than the alternatives? Who are the decision makers and influencers? What is my “stepping stone” strategy?

2. **Remove the barriers:** Barriers of beliefs, relationships, interests, credibility, channels.

3. **Make your pitch:** Use PCAN. Make your pitch memorable.

4. **Secure your commitments:** Target key individuals. Manage the politics. Create a “snowball effect.”
Step One: Survey Your Situation

• Conceive and polish your idea
• Determine stepping stone (social network analysis)
• Set your specific persuasion goals for each conversation
Stepping Stone: How would you approach Jones?
Set your goals for each conversation carefully.

Types of goals:

- **Idea-polishing**—Asking for input: no agreement required!
- **Access**—Requesting an introduction to an influencer.
- **Attitude**—Looking for the “Hmm, good idea!” response.
- **Authorization**—Getting approval and even resources to take the next step.
- **Endorsement**—Seeking active support in public or behind the scenes.
- **Decision**—Securing formal sign-off.
- **Implementation**—Embedding your idea in policies and procedures.
Step Two: Remove the Barriers

“Why should I pay attention to”:

- Beliefs and Values
- Relationships
- Interests
- Credibility
- Channels and Language

Your Idea?

You?
Build the relationship

**Trust** level: Will I extend myself for you? Will I give you the benefit of the doubt?

**Reciprocity** level: Are you reliable?

**Rapport** level: Do I know you?
Remember that **credibility** is the coin of the realm!

Credibility is built on:

- Demonstrated competence
- Expertise
- Hierarchy
- Trustworthiness
TRUST is one of the most important indicators of success.

Trust must be actively developed and sustained by all parties.

Don’t bully through beliefs!

“The human understanding, when it has once adopted an opinion… draws all things else to support and agree with it.”

— Francis Bacon
Strategies for managing belief bias

- Persistence
- Shift audiences
- Fly under the radar screen
- One small step
- Position your idea around a deeper core value
“Parents only care about their own kid in the class picture.”

Understand their interests

1. Why might it be in the other party’s interests to support my idea? When you can, avoid conflicting interests and build on shared interests.

2. What do other parties want that I can give them to gain their support? Look for low-cost ways to give others what they want.

3. Why might they say no? Try to find shared interests that outweigh conflicting interests.
The Channels and Language Barrier: Know the Six Channels of Influence

1. **Authority** (emphasis on using formal positions or rules)

2. **Rationality** (emphasis on using reasons)

3. **Vision** (emphasis on organizational goals, purposes, and aspirations)

4. **Relationship** (emphasis on liking, similarity, and reciprocity)

5. **Interests/Incentives** (emphasis on using trades and compromises)

6. **Politics** (emphasis on managing perceptions and building consensus)

Adapted from influence research conducted by David Kipnis and Gary Yukl, and other sources.
Step Three: Make your pitch

Think **PCAN:**

- **Problem**—A short, concise statement that defines the problem your idea solves (or the need it addresses).
- **Cause**—An explanation of the cause of this problem or need.
- **Answer**—Your solution (or answer) for the situation.
- **Net benefits**—A summary of why your answer is the best available, all options considered.

Source: *The Art of Woo*, chapter 7
Applying **PCAN** to your idea

Three things to remember when developing your pitch:

1. Keep it simple

2. Use evidence that is meaningful *to them*

3. Make it memorable (use stories)
Influencing and persuading: Case Study #2
Step Four: Secure Your Commitments

Commitment: A concrete action that requires effort, is freely chosen, and is observed by or known by people other than you.

- Make the “ask”
  - “You’re going to ask her for the order, right?”
- Have another credible person hear the commitment (Social pressure)
- Note that a high percentage of other people are already taking action (Social norms)
- Exploit the “spotlight effect”: let people feel others are paying attention to their behavior
- Start with small steps
A small step that built a nation...
Influencing is a four-step process

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About CFAR

CFAR is a management consulting firm that helps complex organizations reshape themselves to meet the demands of the new economy. The firm's unique strengths include:

• A uniquely integrated understanding of the economics of business with how people behave, and tools to help leaders overcome resistance to change.
• Twenty-five years of experience in healthcare.
• A diverse bench that includes deep skills in economics, finance, public health, strategy, anthropology, and psychology.
• Founding roots at the Wharton School of the University of Pennsylvania.
• Global experience with healthcare organizations of all kinds.
CFAR’s healthcare expertise

- **More than half of CFAR’s work** is with mission-driven organizations, with deep expertise in **health and hospital systems and academic medicine**.

- We have extensive experience in **complex-stakeholder environments** with multiple sources of authority, including universities, academic medical centers, community hospitals, and professional associations—places where effective **strategy requires truly participative engagement**.

- CFAR brings both **academic and practical expertise in organizational development and structure**, particularly as they relate to the unique challenges of healthcare.

- We leverage a small group of **experienced consultants** to work with sophisticated leaders of large organizations in order to **address unique, high stakes problems**.
Bibliography


Appendix

Influence Cheat Sheet
1. Survey Your Situation

THE IDEA

• **Idea:** What, in a nutshell, is the idea I am selling? (Example: “The Sales Department needs to change its reporting process to conform to new company policies.”)

• **Problem:** What is the underlying problem that my idea addresses?

• **Background:** What are the causes of this problem?

• **Merits:** Purely on the merits, why is my idea better than the status quo? Why better than other alternatives?

SOCIAL NETWORKS, GOALS, AND MEDIUMS

• **Social network analysis:** Who should I speak with and in what order to reach the ultimate decision maker(s)?

• **Goals:** What are my specific goals for my next encounter (gain input, access, favorable attitude, authorization, endorsement, decision, resources, implementation)?

• **Communication medium:** What medium (face-to-face, phone, email) should I use?
2. Confront the Five Barriers

- **Relationships:** What characterizes my relationship to the person I am trying to influence? Positive, Negative, Neutral? How might I enhance or improve that relationship? Should I use an intermediary?

- **Credibility:** What is the basis for my credibility with this person? Am I seen as an Expert? Competent? Trustworthy (i.e. advocating with honorable motives)? How can I enhance my credibility by gaining credible allies?

- **Communication:** What channels of communication is the other party tuned to (authority, rationality, vision, relationships, interests, politics)? Do I need to adjust my message to “broadcast” on those channels?

- **Beliefs:** What personal or organizational beliefs and values does this person hold that could make my idea difficult to sell? Can I reframe my idea to make it more consistent with (or bypass entirely) these beliefs and values?

- **Interests:** Might my idea conflict with the other party’s underlying interests regarding resources, authority, credit, power, turf, or career advancement? Can I reframe my idea to make it more consistent with (or bypass entirely) these interests?
3. Make Your Pitch

Using information from Steps 1 and 2, pitch the idea for maximum appeal.

- **Frame it:** What is my overall “positioning theme” for this idea (i.e. a short, pithy statement that frames your purpose in terms of the language, beliefs, values, and/or interests of the other party)? Example: “Change now to avoid more pain later.”

- **PCAN it:** What is my 5-minute PCAN pitch based on the problem, causes, answer, and the net benefits of your idea?

- **Support it:** What evidence (data, specific examples, personal testimony, actual demonstrations, or agreed-upon social consensus) supports my PCAN pitch and what type of evidence will be most convincing to the other person?

- **Personalize it:** How can I personalize the pitch and make it memorable by using a vivid image, metaphor, emotion, symbolic action, story, puzzle, or challenge?

- **Link it to core values:** What is the best way to link the pitch to key organizational goals and values?
4. Secure Your Commitments

- **Actions:** What observable actions can I request to obtain individual commitments?

- **Politics:** What political objections might third parties raise related to turf, resources, credit, or careers and how can I anticipate and address these?

- **Small wins:** How can I create “small wins,” gain momentum, and generate a snowball effect?

- **Alliances:** What alliances and coalitions should I develop to secure implementation?

- **Credit:** Who can I share credit with (or give credit to) for advancing this idea?