Bridging Worlds: The Future Role of Healthcare Strategy

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• Lisa Henry, Director of Corporate Marketing and Communications, Mary Washington Healthcare
WHY?

Helping your Organization Succeed

Leading Your Team

Frame your Personal Roadmap
Evolving Health Landscape

- Changing Utilization Patterns
- Advanced Science of Medicine
- Technology
- Big Data
- Uncertainty in Payment Models and Policy
- New Competition
- Partners and Collaborators
- Consumerism and Retail-ization
- Engagement and Behavior Change
- Holistic View of Population Health
BRIDGING WORLDS

THE FUTURE ROLE OF THE
HEALTHCARE STRATEGIST
SECOND EDITION

shsmd.org/BridgingWorlds
Implications

- Taking Action steps (20)
- Future Areas of Focus (45)
- Skills (26)
- Attributes (32)
- Tools (73)
Implications

1. Be nimble to exceed the rate of change.
2. Create Consumer Experiences. Tell Powerful Stories
3. Integrate and co-create.
4. Erase boundaries of business.
5. Generate data-driven insight.
1. Be nimble to exceed the rate of change.
<table>
<thead>
<tr>
<th>Present Focus</th>
<th>Future Focus</th>
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</thead>
<tbody>
<tr>
<td>Siloed Thinking</td>
<td>Systems thinking</td>
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<tr>
<td>Operational Mindset</td>
<td>Consumer Mindset</td>
</tr>
<tr>
<td>Bulletproof concepts and extensive pilot projects</td>
<td>Hypothesis testing; pivot on the fly; fast track implementation</td>
</tr>
<tr>
<td>Traditional business model</td>
<td>New business models and revenue streams</td>
</tr>
<tr>
<td>Fully vetted business plans</td>
<td>Minimum viable product; just enough funding</td>
</tr>
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</table>
1+ Be an Internal Consultant

The most valued strategists are those who act as a trusted, internal consultant. Connect the dots across organizational silos and drive action.

3+ Create Agile Strategy

The overarching philosophy should be to provide minimal funding and maximize learning. Provide just enough planning and investment to test a concept, and then move ahead or pivot.

2+ Execute Ideas Faster

Consider how a strategy will be implemented while formulating the strategy without getting mired in operational considerations.

4+ Accelerate and Innovate

Strategists must be willing to change the status quo and apply their understanding of the organization to determine innovation and investment priorities.
Skills, Attributes, and Tools

**SKILLS**

**Critical Thinking**
- 2x2 matrix
- Evaluation frameworks
- Gap analysis
- Laddering

**Design Thinking**
- Apply out-of-industry models
- Directed ideation
- Low-fidelity prototypes
- Oblique Strategies

**Integrative Thinking**
- Balance opposing views
- Parametric modeling
- Ten Types of Innovation

**Pivot-ability**
- Lean Startup model
- Agile development methodology
- Oblique Strategies

**ATTRIBUTES**

AGENT OF CHANGE
- CONTINUOUSLY LEARNING
- COURAGEOUS
- CURIOUS
- FORESIGHT
- INTRAPRENEURIAL
- MOXIE
- PERSISTENT
- RAPIDLY CONSUMES INFORMATION
- RISK TOLERANT

**TOOLS**

**Process Design**
- Process mapping
- P3
- Simulation

**Rapid Prototyping**
- Business model canvas
- Field testing
- Minimum Viable Product

**Shepherding**
- Internal accelerator
- Knowledge sharing platform
- Mentoring
- Rules of engagement
To encourage intrapreneurship and innovation, Adobe developed the Kickbox toolkit for incubating ideas. Kickbox contains tools to help employees develop, refine, prototype, and validate their ideas with customers.

Adobe has released their toolkit as open-source, allowing anyone to use the Kickbox process, modify it, and deploy it across an organization at scale.
Mary Washington Hospital used design-thinking and rapid prototyping to reduce ER wait times.

“Essentially, we pull a lever, check the response, and determine if that lever affects outcomes.”

The success of the prototyping across five metrics—walk-out rate, length of stay for admit, length of stay for treat and release, door to doc, and HCAHPS—inspired the nursing units to adopt additional design-thinking tools.
2
Create Consumer Experiences. Tell Powerful Stories
<table>
<thead>
<tr>
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<tr>
<td>Transactional communication</td>
<td>Behavioral influence</td>
</tr>
<tr>
<td>Segmentation</td>
<td>Influential storytelling</td>
</tr>
<tr>
<td>Acute, episodic interactions</td>
<td>Personalization</td>
</tr>
<tr>
<td>One-way communication</td>
<td>Consumer-centric program development</td>
</tr>
<tr>
<td>Transactional communication</td>
<td>Adaptive content refined through continual testing</td>
</tr>
</tbody>
</table>
Taking Action

1+ Discover Consumer Needs
Healthcare organizations should follow successful retail and technology brands that have pushed further to discover the unarticulated needs of their customers.

2+ Design Experiences
Healthcare strategists need to think beyond the patient journey to develop relationships with consumers long before they ever seek healthcare.

3+ Tell Stories for Impact
Emotional connection is essential to influencing health behaviors.

4+ Accelerate and Innovate
Healthcare organizations cannot allow their brands to remain static; positioning and messaging must be dynamic to align with evolving consumer needs and expectations.
Skills, Attributes, and Tools

Definitions for these skills, attributes, and tools can be found in the Glossary.
State Farm insurance opened a store-front coffee shop and community center called Next Door.

Caters to millennials and entrepreneurs in a hip, mixed-income neighborhood, offering free financial counseling, workshops, Wi-Fi, whiteboards, and meeting space. Next Door was conceived as an inviting, nonthreatening consumer research engine. The State Farm brand is intentionally downplayed to focus on the needs of consumers.
The **Cleveland Clinic**’s social media strategy focuses on highly relevant content on its Health Hub blog, where visitors can find in-depth information and start a conversation.

The health system’s consumer-facing app, called Today, provides comprehensive tools for interacting with Cleveland Clinic. Proprietary software gives researchers privacy-compliant access to health data across the system, accelerating the path to discovery.
3

Integrate and co-create.
<table>
<thead>
<tr>
<th>Present Focus</th>
<th>Future Focus</th>
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<tbody>
<tr>
<td>Structured annual planning process</td>
<td>Dynamic, transformative planning process</td>
</tr>
<tr>
<td>System-wide strategy</td>
<td>Microstrategy</td>
</tr>
<tr>
<td>Siloed functional teams</td>
<td>Nimble, cross-functional teams; facilitated collaboration</td>
</tr>
<tr>
<td>Stakeholder input</td>
<td>Crowdsourcing; manage dissenting viewpoints</td>
</tr>
<tr>
<td>Decision by consensus</td>
<td>Decision by objective merit</td>
</tr>
</tbody>
</table>
**3+ Taking Action**

**1+ Encourage Diversity of Thought and Experience**

Strategists must tap into distinctly different worldviews and experiences, particularly when opposing thoughts can be merged into a more optimal solution than compromise alone can yield.

**2+ Manage Change through Collaboration**

Healthcare strategists should deliberately socialize new ideas through both formal and informal social networks in the organization, building a case for change and a sense of urgency.

**3+ Create a Culture of Transparency**

Create an environment for safe and open dialogue, where ideas are considered based on merits, not positional authority.
Kaiser Permanente Southern California has developed a field-testing methodology to refine technology and process solutions.

Strategists, information technology (IT), and frontline staff come together to develop and test solution prototypes.

Staff who will ultimately use the new technology are part of the design and development process, creating the “super users” who help implement the new solution.
4
Erase boundaries of business.
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<tr>
<td>Acute, episodic interactions</td>
<td>Health and wellness journey; longitudinal relationships</td>
</tr>
<tr>
<td>Market share</td>
<td>Covered lives and targeted populations</td>
</tr>
<tr>
<td>Facility-based care and asset organization</td>
<td>Technology-enabled care; anytime, anywhere service offerings</td>
</tr>
<tr>
<td>Mission-driven community benefit</td>
<td>Culturally competent care; health equity</td>
</tr>
<tr>
<td>Wholly owned system of care</td>
<td>System of care executed through partners</td>
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</table>
Taking Action

1+ Develop Technology Investment Roadmaps
Healthcare strategists are not expected to be technology experts. However, they can help set strategic priorities by identifying the areas where technology is a critical enabler.

2+ Seek Partnership over Competition
Healthcare strategists should understand the nuances of “co-opetition,” the short- and long-term implications, and how to structure novel partnerships to create a foundation for future success.

3+ Apply Different Planning Models
Healthcare strategists should understand new planning models, data sources, and their applications in the healthcare market.

4+ Align Social and Business Missions
Healthcare strategists should lead their organization to partner with local communities to co-design the healthcare delivery system that makes sense for that community and creates a sustainable business model.
4 Taking Action

5+ Design Ecosystems

Strategists should consider how to design ecosystems of products and services that include acute care service lines, health and wellness offerings, and services that extend beyond the traditional boundaries of business.
Spectrum Health’s business development team combined data synthesis, integrative thinking, human needs analysis, and storytelling to transform a collection of data into a plan to improve population health and reduce the cost of care.

The team used health statuses (e.g., well, preventative, acute, pre-chronic, multi-chronic) or personas to categorize the data from “Linda,” the uninvolved chronic, to “Jackie,” the proactive wellness junkie.
Generate data-driven insight.
<table>
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<tr>
<td>Historical data</td>
<td>Real-time data; forward-looking models</td>
</tr>
<tr>
<td>Simple data sets</td>
<td>Integrating multiple data sets, including publicly available data</td>
</tr>
<tr>
<td>Referral tracking</td>
<td>Physician Relationship Management (PRM); Employee Relationship Management (ERM); Customer Relationship Management (CRM)</td>
</tr>
<tr>
<td>Static charts and graphs</td>
<td>Dynamic data visualization</td>
</tr>
<tr>
<td>Individual patient</td>
<td>Individual customers and their social connections</td>
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</table>
1+ Analyze Data Effectively
Organizations must anticipate what could happen next. Predictive analytics does just that by making reasonable forecasts, based on informed assumptions about the future.

2+ Visualize Data for Understanding
Engaging data visualizations allow leaders to quickly identify areas that need attention and to build consensus around direction.

3+ Tell Data-Driven Stories
Strategists should turn data into stories makes to cut through the noise, help people focus, and drive decisions.

4+ Source Nontraditional Data
By having a clear picture of what consumers do in all facets of their life, strategists can draw inferences that will anticipate and influence future behavior.
**Stitch Fix** is a virtual service that provides personalized fashion recommendations using preference data, algorithms, and a human connection.

All aspects of its operations—from managing inventory to employee seating arrangements to making fashion recommendations—have been built on analytics. The core philosophy combines machine analytics with human judgment.
What’s next?
BE PREPARED
STEP TWO

Evaluate Your Skills

SHSMD ADVANCE™ Assess
### Be Nimble to Exceed the Rate of Change: Skills

<table>
<thead>
<tr>
<th>Skill</th>
<th>Performance</th>
<th>Importance</th>
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<tbody>
<tr>
<td><strong>Critical Thinking</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrate skills for evaluating, clarifying, and synthesizing information.</td>
<td>Very Effective</td>
<td>Critical</td>
</tr>
<tr>
<td>Example: Ask questions to assess the accuracy, relevance, and completeness of data.</td>
<td>A Strength</td>
<td>Very Important</td>
</tr>
<tr>
<td>Competent</td>
<td>Important</td>
<td></td>
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<tr>
<td>Needs Development</td>
<td>Unimportant</td>
<td></td>
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<tr>
<td>Address Urgently</td>
<td>Irrelevant</td>
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<td>Unimportant</td>
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<td><strong>Design Thinking</strong></td>
<td></td>
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<tr>
<td>Solve complex problems using an approach that encourages the consideration of human needs, creativity, and rapid iteration.</td>
<td>Very Effective</td>
<td>Critical</td>
</tr>
<tr>
<td>Example: Take time to properly frame the problem to be solved; uncover the needs of end users in order to generate ideas for improvement.</td>
<td>A Strength</td>
<td>Very Important</td>
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<tr>
<td>Make meaningful connections between unrelated elements.</td>
<td>Very Effective</td>
<td>Critical</td>
</tr>
<tr>
<td>Example: Connect the health needs of a population to appropriate care services; forecast the impact on operational resources and financial implications.</td>
<td>A Strength</td>
<td>Very Important</td>
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<td>Competent</td>
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<td></td>
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<tr>
<td>Create an environment that encourages innovation and risk-taking, champion breakthrough ideas, and pursue new business opportunities.</td>
<td>Very Effective</td>
<td>Critical</td>
</tr>
<tr>
<td>Example: Create a new revenue stream by repackaging existing services.</td>
<td>A Strength</td>
<td>Very Important</td>
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<td>Be Nimble to Exceed the Rate of Change: Skills</td>
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<td>3.3</td>
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<td>Critical Thinking</td>
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<tr>
<td>Design Thinking</td>
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<tr>
<td>Integrative Thinking</td>
<td>1</td>
<td>5</td>
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<tr>
<td>Entrepreneurship</td>
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<tr>
<td>Persuasion</td>
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<tr>
<td>Pivot-ability</td>
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<td>Process Design</td>
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- **Self-Assessment Instructions**
- **My Greatest Strengths**
- **My Largest Gaps**
- **SHSMD ADVANCE™ Skill Builder**
- **View or Print My Detailed Report**
- **My Development Goals**
**Storytelling**

**Definition:** Capture peoples' imagination and interest by creating a narrative that appeals to the heart (inspiring vision), mind (credible evidence), and how-to (personal evidence). Example: Capture the essence of learning from data in visualizing a product or service.

**Relates to:** Generate Data-Driven Insight and Tell Stories. Create Experiences

**SKILL DEVELOPMENT RESOURCES**

**ONLINE RESOURCES**
- Building a Content Hub to Bridge Worlds (and Tell Stories)
- Getting the Most Out of Your Media Relations
- In the Shadow of Giants: Transforming the Brand of Cleveland
- The Art of Storytelling in Health Care Branding
- The Power of Persuasion: Storytelling & Persuasion in Content Marketing

**BOOKS**
- Dashboards: Storytelling With Data: A Data Visualization Guide for Business Professionals
- Everybody Writes: Your Do-It-Yourself Guide to Creating Ridiculously Good Content
- HR Guide to Persuasive Presentations
- Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols
- TED Talks: Storytelling: 23 Storytelling Techniques From the Best TED Talks
- The Storytelling Animal: How Stories Make Us Human, 1st Edition

**COURSE, WORKSHOP, OR SEMINAR**
- Digital Storytelling Strategy
- VisualStory 1 Day

**TOOL RESOURCES**

Tools to support this skill may include:
- Answer “Why” first, then “What” and “How”: Start With Why
- Answer “Why” first, then “What” and “How”: Start With Why, How Great Leaders Inspire Everyone to Take Action
- Answer “Why” first, then “What” and “How”: Why your B2B content marketing should ‘Start With Why’
- Dashboards: Visual Storytelling with D3: An Introduction to Data Visualization in JavaScript, 1st Edition
- Dashboards: What to Measure, Metrics and Dashboards to Prove Value
- Mind Maps: Mind Mapping: A Simpler Way to Capture Information
Call to Action

+ Read *Bridging Worlds*, online or download
  shsmd.org/BridgingWorlds
+ Take SHSMD Advance | Assess
  shsmd.org/ADVANCE
+ Create a personal (or team) development plan

+ Discuss *Bridging Worlds* within your team and organization; build your strategy for leading the change
+ Managing up, manage across, manage out, manage down
+ Share your success with a wider audience
ONE NETWORK THAT HAS IT ALL

Strengthen your healthcare strategists—planners, marketers, communicators, and business developers—with SHSMD membership.

Join today at shsmd.org/membership