

## “Six tips for Engaging Leaders in your Value Champion Overuse Project”

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#### Tip # 1: Choose a project that is a good fit [also see Learning Module 3 on Choosing a Topic]

Leaders prefer solutions, not problems. Leaders have the entire organization to manage and it is helpful when everyone rows in the same direction. Choosing a project that is aligned with the organizational mission and supports the work of the organization is more likely to be embraced.

Beyond that alignment, leaders appreciate someone who is willing to step up and lead, functioning independently within parameters. Choosing a topic that is important to you and that you are willing to champion means a lot to a leader who is spinning multiple plates.

#### Tip # 2: Prepare thoughtfully before engaging your leadership

Great ideas are exciting, but most leaders need to understand much more – especially about the cost/benefit ratio. Your preparation strategy should ensure that you can share data to help leaders understand the problem of overuse, have a thoughtful strategy to address the problem as well as some predictions about the impacts and anticipated financial and human resource costs. Many leaders prefer a written document that they can react to such as a Project Charter. [see description below and tools/resources for creating one in Learning Module 12: The Project Workbook]

Part of proposing a de-implementation or low value care project is shining a light on a problem. That is always difficult news to deliver. It is important to share data about the issue to demonstrate the problem within your organization as well as current practice standards. [see Learning Module 7: Data and Measures] It is helpful to not be overly negative or frustrated but rather be objective that a problem exists, and this is how we know it.

Next, some observations about what insights you have about why this issue currently exists will be helpful. It is not helpful to point to certain people but rather systems issues that have either facilitated or failed to curb overuse. These insights drive your theory of change, in other words, what changes are needed to redesign systems that promote appropriate care and make it easy to do.

Finally, the impact of the project should be discussed with leadership and stakeholders across your organization. [see Learning Module 4: Stakeholder Assessment] You won't have all the answers, but you should include potential benefits to patients, the organization and the health system overall.

Many champions find it useful to capture these thoughts in a Project Charter. [link to template and charter sample in the Project Workbook]. Charters may seem a bit daunting initially, but a vast majority of champions find them useful and worthwhile. Completing a charter means that you have thought through critical questions about what you are trying to accomplish, why it is important, who you will need to ask for help, which system changes might be helpful and how you will measure success. Because charters often include enough detail to understand the project, charters are a valuable communication tool to engage leaders and other key stakeholders. Charters are also useful to get your

project plan/ideas/strategies down in one single document that you can refer to later. It should also be considered a 'living document' that is modified as you move through your project.

### Tip #3: Prepare your pitch

Yes, you have to do the work of Tip#2 and no you won't be able to share it all with leadership in one meeting!

Knowing your leader is extremely helpful to know what to share. Some champions ask colleagues who interact with leaders more closely about what seems to resonate. It is also acceptable, in certain instances, to ask your leader directly how they best prefer to get information and updates throughout your project.

In general, your pitch should come across as meaningful, sensible and feasible. Many champions include a patient story to emphasize the need for action. The Charter backs up your brief opportunity to share your thinking in person and demonstrates your thoughtfulness in thinking through key issues.

Also, it is wise to ask for input. Leaders have a valuable perspective and can add insights as well as spot roadblocks you might not have considered. For example, you could ask: "who do you think are the most important stakeholders I should talk to?" or "What unanticipated roadblocks or push-back might I encounter?" Offering to partner with your leader around an important issue has served well as an engaging strategy.

### Tip # 4: Plan regular updates

Leadership engagement is not a single event. Although you are the champion and providing guidance, leaders are ultimately responsible. It is good practice to commit to milestones and to have regular meetings to update leaders on progress as well as challenges and barriers. It is recommended to meet briefly at least every 4 – 6 weeks with your leaders. Leaders may prefer a written report as well. When in doubt, ask!

Leaders enjoy hearing of progress, especially when presented thoughtfully and backed up with data. Share anecdotes and stories about how the changes are impacting staff and patients. Affirm staff who are contributing to the efforts. Remember to ask for input and course corrections. Leaders are more likely to stay engaged when they feel invited and valued to do so. Leaders also can remove or mitigate barriers so come prepared with some ideas about constructive solutions. And when they do intervene, express appreciation for their efforts.

### Tip # 5: Engage Informal Leaders

Thus far, we have been addressing how to address senior leaders or project sponsors. Once the project is ready to launch, you will find it useful to have conversations with other key staff and stakeholders. [see Learning Module 4: Stakeholder Assessment].

We use the term informal leaders to include staff that are impacted by systems that are involved in overuse or those that will be impacted by system changes that foster appropriate care. These might be management staff or highly regarded opinion leaders. All are stakeholders who might be interested or impacted by your project.

These staff members must be engaged by understanding the rationale to decrease overuse. Once they understand the costs and potential harms to patients, invite them to design roles responsibilities and workflows to make these changes. Hopefully, you will consider at least one of these individuals for your team but engaging those who do the work to participate and contribute is well worth the time. [See Project Workbook section on Building Your Team]

#### Tip #6 Foster your own leadership

As you set out on a journey of healthcare improvement, it is important to acknowledge that you have created a leader in yourself. Maybe this is your first project, maybe it is your 50<sup>th</sup>, but as it develops, there will be immense opportunity for personal leadership growth. This growth and experience will propel you as an individual clinician as well as propel your current and future projects. The opportunity to journal about your project in your project workbook will provide you with a time to reflect, learn and grow as you develop your leadership skills.

#### Summary

We have briefly discussed 6 tips for leadership engagement. Consider how these tips might play out in your situation. What other context or organizational culture issues should be included in your thinking as you engage with leadership and launch your overuse reduction project?