Successfully Presenting a New Initiative

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• We do not intend to discuss an unapproved/investigative use of a commercial product/device in our presentation
Today

• Why new initiative proposals fail
• The need to be strategic
• Getting buy-in
• Knowing your audience
• Making a successful presentation

Learning Objectives
1. Be able to successfully present and get approval of new initiatives
2. Understand how to be a more effective presenter

How about we ask the hospitalists to do that?
Learning Together and Sharing Ideas

• Get together with 3-4 people near you, but try not to include anyone you know
• Introduce yourself and where you are from
• Think of and share an initiative that you are interested in moving forward

Why Do Initiatives Fail To Be Approved?

A physician has a great idea for a new program …but can’t get it approved

Why?
Massive Change and an Unpredictable Environment

It is an extraordinarily dynamic health care environment...

...and the pace of change will get faster

...the vast majority of change initiatives at most organizations will fail

...every organization has very limited resources

The Need To Be Strategic

During times like these,
...with urgent needs,
...a challenging environment,
...and very limited resources
“great ideas” are not enough
The Need To Be Strategic

**Urgency + Alignment**

The greater the initiative meets urgent needs of the organization and is aligned with its strategy and goals, the greater the chance it will be approved.
The Need To Be Strategic

- Do you know your organization’s strategy?
- Do you know your organization’s goals and focus?
- Will this initiative solve urgent problems or help seize significant opportunities?

Sell the problem/opportunity and its strategic alignment *first*, then sell your solution

Getting Buy-In

- Who can approve this initiative?
- Who can stop this initiative?
- Whose buy-in do I need?
- Do I need people from the finance department involved?
- How can I involve these people as early in the process as possible?

Avoid the “big presentation” and have as many of the right people involved as early as possible
Knowing Your Audience

- What is their communication style?
- What is the pace that information is delivered to them?
- What is going on in their world?
- What are their needs?
- How has your presentation been framed for them?
- What is the setting for the presentation?

If you were them, what would you need to know to approve the initiative?

Making a Presentation that Truly Communicates

Think of a particularly effective presentation you saw:
- What made it effective?
- What did the speaker do that made it effective?
- How did the speaker make you feel?
- How many main points did you remember three weeks later?
Focus on Clear Outcomes

After the presentation, what do you want to happen?

To get this, how do you want the audience to react?

“I want to (intention) my audience so they will (objective)”

• Your content and delivery should be congruent and focused on your intended reaction and objectives

Focus on Clear Outcomes

• Start with selling the problem/opportunity in a compelling way
• Avoid an “information dump”, you are not there to tell them “all you know”
  - Focus instead on key concepts and your key points...anything in addition to this clutters the message
  - Refer to resources for more detailed information
Establish Credibility

- Through bio, introduction, or woven verbally into your initial comments, share your source of expertise:
  - Deep experience
  - Recent exposure/expertise gained
  - Done research in the area
  - Formal education
  - Involved in a particular success story

If Using PowerPoint, Use it as a Visual Aid

- No more slides than half the presentation minutes
- Phrases not full sentences, and high level summary data only
- Keep slides to six bullet points
- One main point per slide...that can be grasped in 10 seconds
- Never read the slides
- Images/animation = Good!!  ...*but overly busy = distracting*
“I know you can’t read this slide but...”

Making the Presentation

• Only “Secret”:
  
  *Rehearse,
  *Rehearse,
  *Rehearse,*
  
  out loud, in different settings
• Know your material so well you can “wing it without the PowerPoint”
• Be “in the moment”, focus on *listening* to your audience, adjusting to achieve your intention and objective
• Avoid “defensive” body postures (crossed arms, hands in pockets, pointing)
• Avoid fiddling with props or “pacifiers”
• Spread eye-contact around the room
Nervousness

“There are only two types of speakers in the world, the nervous and the liars”

-Mark Twain

Nervousness

- Frame your nervousness as a source of energy...you need it!

“I’m excited”

- Take deep breaths, visualize your success
- Don’t mention your nervousness or apologize...they won’t see it
- When your mind goes blank, pause, take a deep breath
“I’m going to pause here for a few questions before moving on...”

Vocal Pauses

• Vocal pauses are *good* if they are *silent* ones
  - Sound calm and thoughtful
  - Practice deliberately inserting one or two second silent pauses into your presentation
• Minimizing “um”, “ah”, “like”, “You know” and “ok”
  - First: Become aware of your use of vocalizations
  - Second: Attempt to eliminate them but it will take time
  - Third: Substitute silent pauses for your vocalizations, this allows your presentation to be dynamic and “breath”
What If I Can’t Answer a Question?

“I want to make sure you have the most up to date information so let me get back to you”

After Your Initiative Is Approved...

Thank everyone involved
Lessons Learned

• You have to understand the current operating environment for your organization

• Understand your organization’s culture and how “it really works”

• Having finances support and involvement can really be helpful

• Do all you can to get input from people as early as possible in order to avoid the “Big Pitch” presentation

• Everything will take at least twice as long as you think it should...it if were easy, it would have happened already
Tool for Successfully Presenting a New Initiative

1. Review your organization’s goals, strategy and current environment.
   - What critical problem or significant opportunity does the new initiative impact?

   _________________________________________________________________
   _________________________________________________________________

   - Is it aligned with your organization’s highest priorities? Does it address an urgent need? If so, what part of the goals or strategy does it help the organization achieve?

   _________________________________________________________________
   _________________________________________________________________

   - What is your organization focusing on? A crisis? Large scale projects being implemented?

   _________________________________________________________________
   _________________________________________________________________

2. Determine the resources needed to support the initiative:
   - What is the cost and potential return on investment (collaborate with your finance or decision support department to determine this using their methodology)

   _________________________________________________________________
   _________________________________________________________________

   - What are the FTE’s impacted or needed for the initiative?

   _________________________________________________________________
   _________________________________________________________________

   - What other departments are impacted? Information Systems, Education, other clinical areas)

   _________________________________________________________________
   _________________________________________________________________

   - How far in advance is it typical in your organization that significant projects are planned?

   _________________________________________________________________
   _________________________________________________________________

3. Plan how you will incorporate key individuals into the planning process to get their input and involvement:
   - How will this initiative be approved in your organization?

   _________________________________________________________________
   _________________________________________________________________

   - Is your finance department involved early if there are cost implications?

   _________________________________________________________________
   _________________________________________________________________
• Who can stop this initiative?

• Whose buy-in is needed?

• How will you involve them as early as possible in the process?

• To whom will you be presenting the initiative? How can we minimize how many meeting participants will be hearing about this for the first time?

4. Plan and deliver the presentation on the initiative:

• Have you determined your key audiences, the style and forum they use and how they like to receive information?

• Will the people you need to support the initiative be in the room?

• Are your presentation materials focused on attaining a clear outcome, excluding the non-essential that may clutter your message?
  “I want to _______________ my audience, so they will _______________.

• Have you practiced the presentation with everyone involved in delivering it?

• Are you prepared with a “plan B” if there are Audio/Visual issues?