

## Successfully Presenting a New Initiative

Pediatric Hospital Medicine Conference  
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## Disclosure

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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



5

## Why Do Initiatives Fail To Be Approved?

A physician has a great idea for a new program  
...but can't get it approved

**Why?**

6

## 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

7

## The Need To Be Strategic

During times like these,  
*...with urgent needs,*  
*...a challenging environment,*  
*...and very limited resources*  
**"great ideas" are not enough**

8

## 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

# Urgency + Alignment



## 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 breathes, 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?*

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

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

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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)*

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

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

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

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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?*

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

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- *Who can stop this initiative?*

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- *Whose buy-in is needed?*

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

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- *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?*

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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?*

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

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- *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 \_\_\_\_\_."*

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

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- *Are you prepared with a "plan B" if there are Audio/Visual issues?*

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