EXECUTE YOUR PLAN:
DEVELOPING RELATIONSHIPS WITH POTENTIAL PAYERS AND COMMUNITY PARTNERS

December 2017
Organizational Strategy

- Organization Vision
- Environmental Scan
- SWOT Analysis
- Feedback and Support
A Roadmap

No two paths are identical
Step 3: Execute

Implement strategies to address organization specific strategies

PLAN
Your Execution...

EXECUTE
Your Plan...
Examples

- Analytical, Data-Driven Decision-Making
- Articulating your Value
- Building Essential Infrastructure Support
- Developing Quality and Performance Management Systems
- Making the Business Case for your Services
- Negotiation/Contract Strategies
Today’s Speaker

- Rita Wiersma
  - CEO, Community Involvement Programs
Changing Times—it’s a retail market

- Current funders moving from state and county to new players
- Every one you have past relationship with is changing
- Gone are the days of relying on past relationships
- Data means...something!
- Yes, new entities will hire your best employees
- Focus outward
Getting in the Door

- How do I connect and with whom?
- What should I tell them?
- What do I need to learn about them?
Listener, Learner and Leader

- Listen every opportunity you get
- Learn what their business is and their charge
- Lead...help them learn about...
  - you,
  - the services you provide,
  - the people you support
  - culture of your area, and
  - share success stories
- Don’t circle the wagons
The sky is not falling
Don’t forget to get your entire organization on board
Change management is ongoing
Focus on the people you support and their families

- Be honest and open with those you serve
- Be reassuring
- Advocate recognizing times are changing
Create and Innovate

- Service can be done differently... Cole’s story
- Find champions
  - Staff
  - Families
  - Individuals
  - Teams
  - Community
Partnering with honesty, integrity and vulnerability

Take time to evaluate your services and understand the pros/cons of each

- Examples—our evaluation which resulted in a move from group homes and move from CDCS
- Can you be everything to everyone?

Dollars do matter

Using data to prove your point
In the end, it's about relationships

- Building for the future
- Remember who it's about
- How will your organization be remembered after the transition is over?
Recommended Learning

- Good to Great by Jim Collins
- Good to Great and the Social Sector by Jim Collins
- Traction by Gino Wickman

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Who are the right people?

- Who handles business development?
- Who makes decisions regarding contracting?
- Who is concerned about individual outcomes and community connections?

An in-person meeting with leadership is optimal, but may often not be necessary or initially attainable. Build relationships with all possible entry points.
What is the right information?

Outline:
- Your mission
- The services you provide
- The value of those services to the potential payer or partner
- The prospect of building a mutually beneficial partnership

Listen:
- Identify issues of importance
- Use that information to modify your business strategy and/or communications
Tips for Initial Introductions...

- Do your research
- Be concise
- Be clear
- Answer the question “why me?”
- Leave an action item
- Follow-up
Always be ready

- Develop an elevator pitch – a short “sales pitch” that is used to quickly and simply state and define your value proposition – that can be used in your communication with potential partners to effectively convey your message.
Monthly Webinar Series

- Webinars held the 4th Wednesday of every month.
- Archives found at: hcbbsbusinessacumen.org/webinars
Thank You!

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