Launch of Sales Peer Mentorship Program Toolkit

Chris DeCola

Agenda

Why Change?

Change Model - ADDIE

- **Analyze/Assess**
- **Design**
- **Develop**
- **Implement**
- **Evaluate**

Visual Aids

Resources

References

When to know when…
Why Change?

Change is in the air

The Healthcare Industry continues to be in flux post-pandemic	Growing Organizations can become disjointed and unaware	Tradition can be comforting during times of change; what are we holding onto?	Top and Bottom-Line Revenue targets are increasingly difficult to meet	Medicare reimbursement rates continue to fluctuate without warning
Turnover rates in the field have continued to grow post-pandemic	New employee length of stay is the worst in company's 40-year history	New Sales Exit interviews show a lack of training and support are #1 reason to quit	Tenured Sales Reps report being burnt out due to lack to support staff to ensure services are rendered	Employee Satisfaction surveys report an overall dissatisfaction with transparency and support from above

What if:
We could change the way we train and engage new hires and each other to improve job satisfaction, performance and retention?

What if:
The way to do this was via the power of dialogue with those most closely affected by these changes?

Engagement is the point

“Leadership beings with understanding that every gathering is an opportunity to deepen accountability and commitment through engagement.” **- Peter Block in *Community: The Structure of Belonging***

Analyze/Assess:

a. Ask Questions about our processes and our culture
b. Four Early Questions
c. Listening
d. SWOT
e. Systems Thinking & SATA

Ask Questions/Gather Data

Ask Questions about our processes (what we do) and our culture (how we do it)

- What is our on-boarding process for new sales reps?
- Which departments are involved in developing curriculum?
- Why do we do things the way we do them?
- What are the benefits of our current procedure? What are the drawbacks?

Four Early Questions

"The most effective way to renegotiate the social contract is to ask people to rate on a seven-point scale, from low to high, their response to four questions" – Peter Block

1. **How valuable a project do you plan for this to be?**
2. **How much risk are you willing to take?**
3. **How participative do you plan to be?**
4. **To what extent are you invested in the well-being of the organization?**

Listening

Effective listening often depends on what is going on in the head and heart of those communicating, rather than what is taking place on the outside. If we don't free our minds of perceptions and put aside our prejudices, our need to be right, and our preconceptions about those with whom we interact, it will be difficult to move" – Madelyn Burley-Allen from *Listening: The Forgotten Skill*

- **Avoid Biased Listening/Hearing what we want to hear**
- **Human-centric change begins with asking questions and learning how to listen**

Guidelines for Empathetic Listening

a. Be Attentive. Create a positive environment where the other person feels important and valued

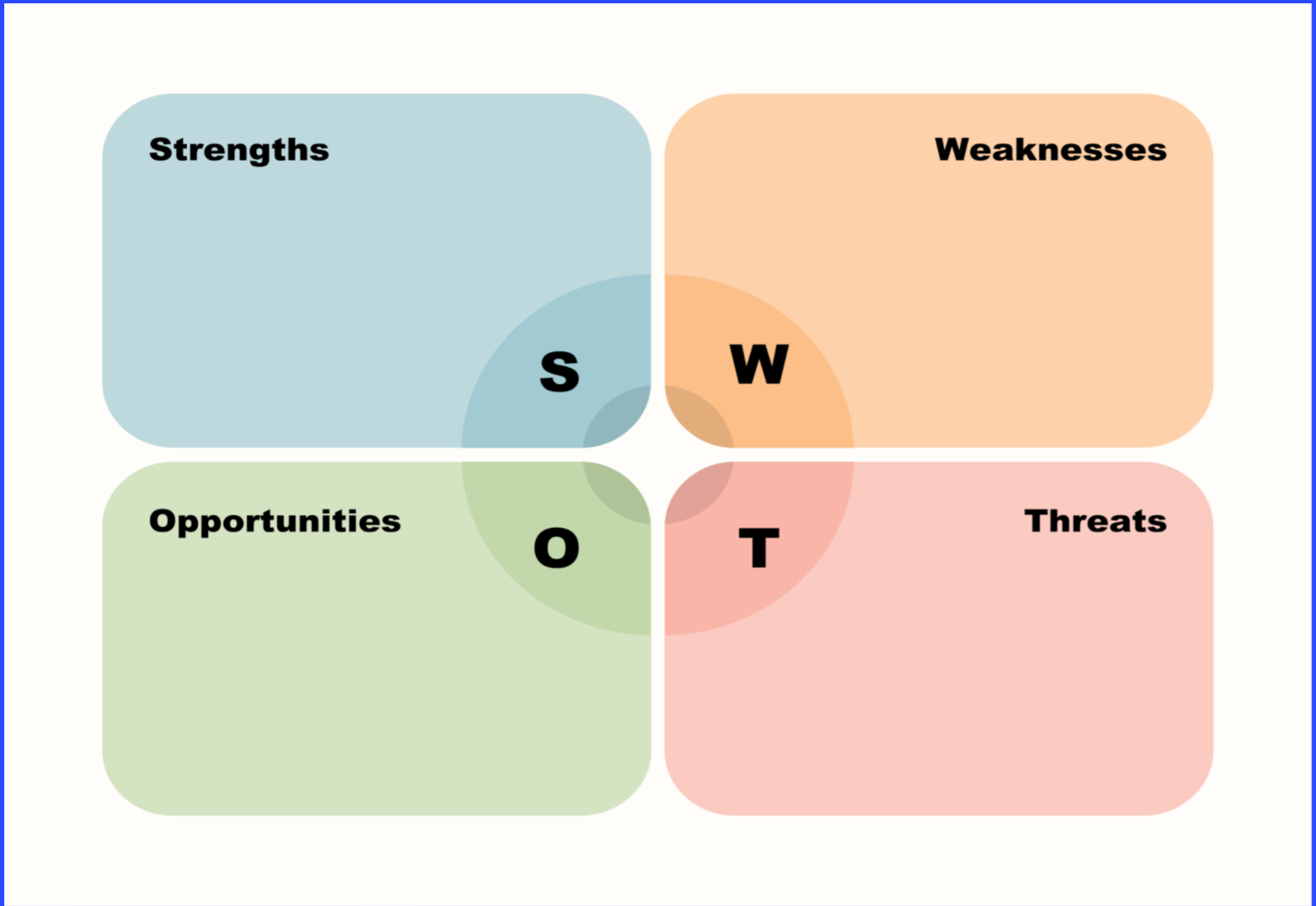
b. Be interested in other's needs. Remember, you are to listen with understanding

c. Listen from the OK-OK attitude (Be a sounding board, don't ask a lot of questions, act like a mirror by reflecting back what you think the other is feeling and/or saying; because they discount a person's feelings avoid using phrases like "Oh, it's not that bad", "You'll feel better tomorrow", etc.)

d. Don't allow yourself to become upset, hurt, angry or pass judgement on the other person

e. Use encouraging, non-committal acknowledgments like: "I see", "Right", "Uh-huh", "Oh!", etc.

SWOT Analysis



1. *Strengths*
2. *Weaknesses*
3. *Opportunities*
4. *Threats*

The SWOT analysis process will allow us to engage with each other using human-centered discussions, surveys, and cross-departmental focus groups to determine our baseline

Systems Thinking

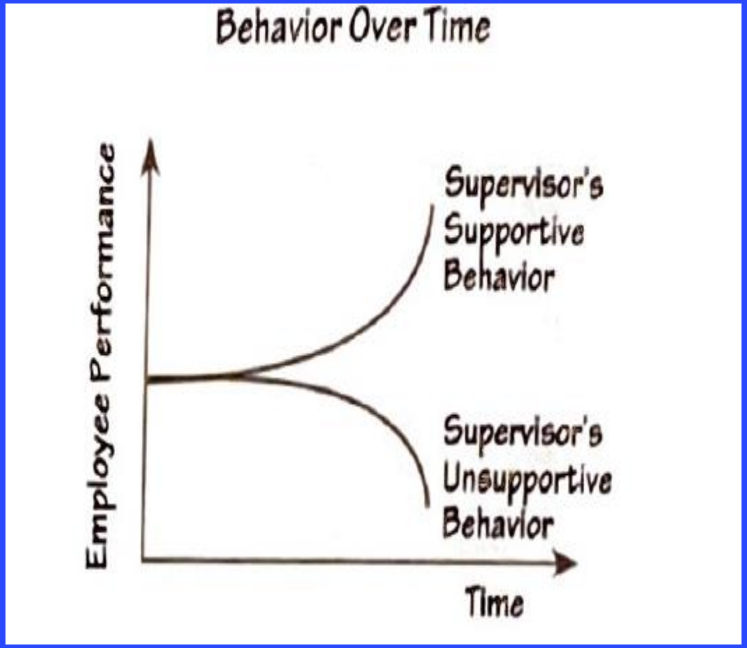
When we begin to see the world and one another-through this "lens," we start seeing our circumstances in a new light, taking more responsibility for our own role in problems, and identifying more effective ways of addressing recurring difficulties" - Virginia Anderson and Lauren Johnson from *Systems Thinking Basics*

- **Understanding how systems work allow us to function more effectively within them**

- **Systems Thinking is as much a language as it is a perspective that allows us to better understand the roles we play in the system and how to better anticipate the on-going change that is constant**

- **Systems thinking accentuates the interconnectedness of a department and organization as a whole**

- **We can use Events/Patterns/Structure pyramids, diagramming patters and causal loop diagrams to foster understanding**



SATA

Sponsor/Advocate/Target/Agent is a way of “helping sort out problems of alignment when work that crosses boundaries and layers isn’t going well. (It) can be used from any spot in an organizational chart as a way of creating progress when work and initiatives seem stuck” – *Gil and Chris Crosby*

Sponsor Initiating – Top level decision maker

Sponsor Sustaining – Decision Maker

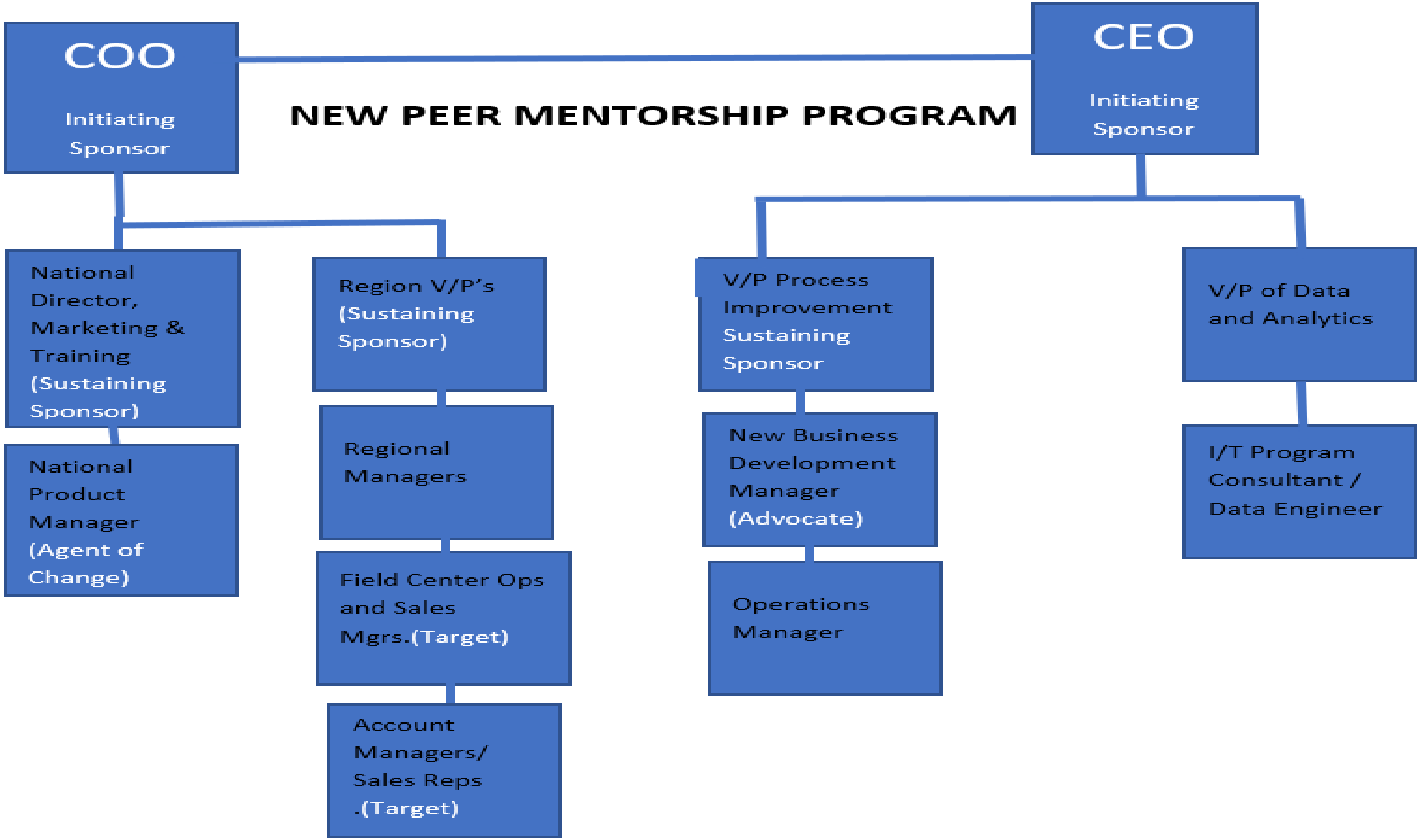
Advocate – cross departmental partners

Target – identify who those who will be responsible for implementing the change

Agent of Change – responsible for driving change though all channels; can be anywhere in the org chart

SATA

NEW PEER MENTORSHIP PROGRAM



When to use these Dialogic Organizational Development tools

ANALYSIS GOALS:

These tactics foster an overarching goal of inclusivity and human-centric value with the goal in mind to:

- **Foster an organizational culture shift**
- **Be utilized starting now for as we gather perspectives to tailor the development & sponsorship of the Peer Mentor Program**
- **Be integrated for consistent day-to-day understanding on a go-forward basis**

When to use these Dialogic Organizational Development tools

ANALYSIS TOOLKIT:

INITIATIVE	WHAT	WHEN	HOW
Questions	Stakeholders in each department and the field to be polled	Starting Now	Surveys, Team Meetings, Focus Groups, In-person fact-finding
Listening	Stakeholders in each department and the field	Starting Now	Listening workshops for facilitators; Listening tours for program developers; Training to identify inter-dept. embeddedness
SWOT	Based on gathered data analysis	Post-Generative Questions	Data synthesized by Mentorship Lead from each department
SATA	Use key figures to drive, communicate and implement change as it relates to new hire training and retention	After data analysis uncovers opportunities for growth and change	Gain sponsorship from C-Suite, engage advocates and agents, target salesforce (new hires & tenured reps)

What if?

Design:

Set Goals for the project using:

- **Generative Questions**
- **Brainstorm Ideas**
- **Visualization**

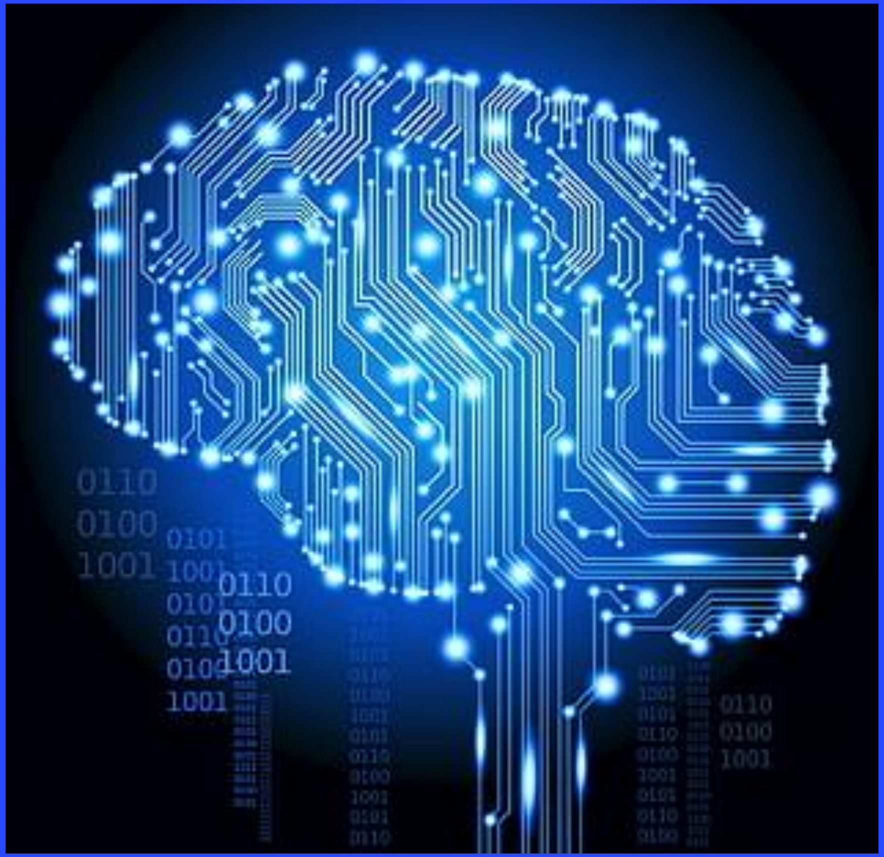
Generative Questions use human centric engagement to design a new tomorrow

- **They challenge our ordinary ways of thinking**
- **They make room for diverse perspectives**
- **They present new information**
- **They stimulate creativity and innovation**

Conversations Worth Having **by Jackie Stavros & Cheri Torres**

Brainstorm Ideas with Liberating Structures

- Blue Cards & Trigger Questions
- Contra-logic
- Worst Idea
- Change Perspective
- 25/10 Crowd Sourcing



Visualization Basics

“”Visualization is fundamental to design thinking. Remember, we are envisioning an improved future, working in the unknown, and relying on collaborators to help shape the results. So we depend upon visual methods to make our thinking accessible to others” – The Design for Growth Field Book

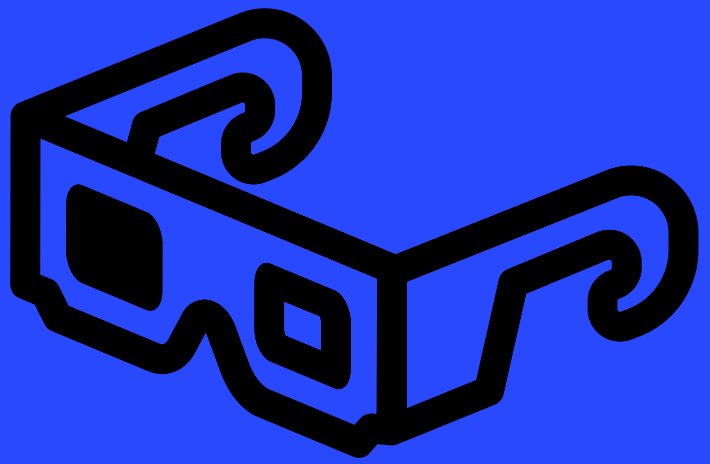
- **Storytelling**

(Hero, Supporting characters, Setting, Plot exposition, Tension, Climax, Resolution)

- **Story boarding**

Ideal with systems or processes

- **Video**



When to use these Dialogic Organizational Development tools

DESIGN TOOLKIT:

INITIATIVE	WHAT	WHEN	HOW
Generative Questions	Check back post-data analysis, share findings, engage generative questions to fuel a sky's the limit mentality	Promptly after the conclusion of the analysis phase	Follow-ups with everyone who participated in original data gathering
Brainstorm Ideas	Geographical live gatherings to take place in tandem with various virtual activities to foster inclusivity and involvment	Schedule during previous step to keep momentum and focus strong	Using various liberating structures to mine the best work out put and varied perspectives of community
Visualization	Envisioning an improved future based on community wide participation will galvanize support	After Liberating Sturcture data is synthesized	Storyboarding in tandem with story telling

Action

Develop

- Plan the Work
- Engage others in Action Planning
- Ensure Alignment in Action Plan
- Responsibility Charting
- Action Planning Checklist
- Develop a Communication Strategy

Plan the Work

1. Mobilize Commitment to change
2. Develop a shared vision of how organize
3. Foster consensus for the new vision
4. Spreading revitalization to all departments without pushing from the top
5. Institutionalize through formal policies, systems, and structures
6. Monitor and adjust strategies in response to problems in the revitalization process

Set up the Action Plan for success

- **Engage others – planning through engagement practices pay off**
- **Change Agents must ensure alignment of those in the SATA structure**
- **Responsibility Charting is an important tool to make sure everyone is accountable**
- **Develop a communication strategy to eliminate risk of misinformation and rumors that can be demotivating and undermine support**

Action Planning Checklist

1. Given your vision statement, what is your overall objective? When must it be accomplished?
2. Is your action plan realistic given the level of organizational support, your influence, both formal and informal, and the resources likely to be available to you? What can you do to address shortfalls?
3. Are you and your team committed to implementing the change and does it have the competences and credibility needed to implement the action steps? If not, how will you address the shortfall?
4. Is your action plan time-sequenced and in a logical order? What would be the first steps in accomplishing your goal?
5. What is your action plan? Who will do what, when, where, why, and how? Can you do a responsibility chart?
6. What would be milestones along the way that will allow you to determine if you are making progress? What is the probability of success at each step?
7. Have you anticipated possible secondary consequences and lagging effects that your plans may give rise to and adjusted your plans accordingly?
8. Do you have contingency plans for major possible but undesirable occurrences? What things are most likely to go wrong? What things can you not afford to have go wrong? How can you prevent such things from happening?
9. Do you have contingency plans in the event that things go better than anticipated and you need to move more quickly or in somewhat different directions than initially planned, to take advantage of the opportunities?
10. Who does your plan rely on? Are they onside? What would it take to bring them onside?
11. Does your action plan take into account the concerns of stakeholders and the possible coalitions they might form?
12. Who (and what) could seriously obstruct the change? How will you manage them?

Courtesy of Organization Change by Gene Deszca, Cynthia Ingols and Tupper Cawsey

When to use these Dialogic Organizational Development

DEVELOPMENT TOOLKIT:

INITIATIVE	WHAT	WHEN	HOW
Plan Work & Engage Others	Develop the Training Curriculum/Program Outline; drive engagement of both new hires (mentees) and tenured reps (mentors)	Immediately post-Design phase	Utilizing key stakeholders and departmental champions
Ensure Alignment	If organization or executive leadership is not 100% bought in, program will falter	Immediately post-Design phase	Data Synthesis; customizing benefit statements to the pain points of each participant
Responsibility Charting	Accountability is a must for a culture changing initiative	After alignment is secured	Weekly roundtable progress updates will allow real time changes/fixes
Communication (Clarity) Strategy	A healthy organization needs consistent, on-going clear messaging and transparent updates	Late in the development stage providing next steps and consistently there after	Email updates, Company intranet landing page, quarterly updates

Peer Mentor Program Implementation:

- **Synergy Club to provide training and resources to selected Mentors**
- **Start with 15 tenured reps partnered with 50% of new hires for 90 days (pilot group)**
- **Nationwide launch thereafter**
- **Tracking via PowerApp**
- **Weekly feedback and on-going progress checks with mentors, sponsors and advocates**
- **On-going communication to organization**
- **Successes and Accomplishments recognized and celebrated**
- **Rewards**

Implementation Toolkit Timeline (on-going):

Rewards, Acknowledgement, Polling, and on-going Communication about the progress of the program will ensure that engagement and feeling of ownership among the community will be maintained

Evaluate Toolkit:

Evaluation Toolkit Timeline (on-going):

On-going Feedback, Progress Checks, Surveys and Data-driven Communication are all important factors to ensure as systems change, our program is positioned to quickly pivot to address burgeoning needs

- Diagnostic and Steering Controls Systems

Data driven (pilot group retention rates, sales numbers and employee surveys versus new hires without mentors)

- Poll other stakeholders to determine what changes may need to be implemented
- Belief System Survey – what are general beliefs of the organization as a whole; can a culture shift be detected?

Visual/Training Aids

- Peer Mentorship Launch Materials with a focus on already collected data concerning lack of on-going support and training resources
- Mentee Additional Training Items (to be further customized based on outcome of ADDIE process)
- Screenshots of power app for on-the-go connection with Mentor
- FAQ's about Peer Mentorship Effectiveness

Examples of Training & Retention Resources

Selling Stategically. Module 2.

SynergyClu

Selling Strategically with Decile information:

Lincare has partnered with Health Market Science (HMS) to obtain data surrounding the prescribing and treatme habits of the physicians in your market. This data should be used to help you sell strategically by data set.

What is a Decile rank?

A **Decile rank** arranges data from lowest to highest and is done on a scale of one to ten where each successive number represents 1/10 of the sample size. The higher the Decile the greater the opportunity.

What does each Decile tell me?

- **COPD Decile:** Data surrounding the COPD patient population being treated in-office by your physicians.
- **Oxygen Decile:** This data set presents the amount of home oxygen that is being prescribed by NPI
- **In-office INR:** This Decile ranks the volume of office INR testing and management usually performed as a poi of care finger stick or vein draw
- **Home INR:** This data set presents the amount of home INR monitoring that is being ordered by NPI
- **OSA Decile:** Data surrounding the Obstructive Sleep Apnea patient population being treated in-office by you physicians
- **PAP Decile:** This data set present the amount of CPAP therapy that is being ordered by NPI

Where is this data stored?

The Decile data can be viewed in the Synergy CRM and ordered accordingly by Decile opportunity, city, or zip cod for example.

Center Accounts

Search this view

Account Name	Billing City	Billing ZIP/...	Business P...		COPD Decile	Oxygen Decile ↓	OSA Decile	CPAP ...	INR Home ...
CHERIAN JOHN	BURGETTSTOWN	15021	A 7249475350	-.	9	9	8	3	--
RAJNISH DHAWAN	CHESAPEAKE	23320	-- 7976093236	-.	9	9	8	5	--
MICHAEL BLATT	WHEELING	26003	-- 3042348663	-.	9	9	8	4	--
FABRIZIO MONGE	PUNTA GORDA	33950	-- 9416131777	-.	10	9	10	9	--
OMDEVASENA THIRUGNANA	LAWRENCEBURG	47025	-- 5137217533	-.	9	8	9	9	--
LAWRENCE KRAMER	WATERTOWN	13601	-- (315) 786-0254	-.	10	8	10	6	--
BRUCE JOHNSON	VIRGINIA BEACH	23454	-- 7576863508	-.	10	8	9	6	--
Andrzej Jaworski,MD	Morgantown	26505	-- (304) 598-2801	-.	10	8	9	6	--

Call Point Roadmap

SynergyClub

	Oxygen	Nocturnal Oximetry	Unit Dose	CareCheck	mdINR	NHV	PAP	Enteral
Pulmonology	●	●	●	●	●	●	●	
PCP/Internal Medicine	●	●	●	●	●	●	●	●
Cardiology	●	●			●		●	
Oncology	●			●	●			●
Home Health	●		●	●	●	●	●	●
Sleep Labs	●						●	
Anticoagulation Clinics					●			

Welcome!

SynergyClub

Congratulations Hannah Moix and welcome to the Lincare family! You have been enrolled in the Synergy Club Peer Mentorship program and matched with one of the most successful sales reps in the nation to guide you through your first year on the job. I am pleased to introduce you to Dakota Brooks, your assigned mentor from Brookhaven, MS. Your mentor will be in touch shortly, or you can contact them directly via their mobile number (601) 754-1899. Each week of your first six months on the job, you'll be meeting with your mentor. During this time there will be assigned training modules to review and some pre-call planning and territory research that they will be guiding you through. To begin the process, please follow the instructions below to download the necessary Power App onto your mobile device. Contact your mentor with any questions.

Download Power Apps onto your personal device to access Synergy Club via the following instructions:

1. Go to App Store of your phone
2. Search **Microsoft Power App** which is a standard and free Microsoft product that you will need to run any Power App
3. Install App
4. Login to Microsoft Power App
5. Choose **Synergy Club Power App** from the list of available applications
6. Start the **Synergy Club Power App**
7. Add a short cut to your phone's home screen for your Synergy Club Power App
8. Please begin the **Getting Started Module**

Instructions to download Outlook and Intune onto your mobile device can be obtained here.

Mentors:

1. Please check the Synergy Club Power App on your mobile device to make sure your mentee is assigned to you and their info is properly loaded
2. Make contact with your mentee to introduce yourself
3. Contact info for: Hannah Moix 870/718-5995 / HMoix@lincare.com