

ActionOI – Meeting Plan

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Table 1: Meeting Information

Customer	Presence Health			
Solution Scenario	Presence Health turned over its executive leadership team in early-mid 2016 and most new leadership came from Advocate Health, a strong ActionOI user. In 2016 Presence indicated that operational performance benchmarking in support of overall performance improvement would be a 2017 initiative. We have been invited for a meeting with one of our prior contacts and the newly placed System Director of performance improvement to discuss their current thinking on 2017 priorities and approach.			
Date of Meeting	2/10/2017			
Participants	<p>Presence Health:</p> <ul style="list-style-type: none"> • Bryan Eklund, EVP of Operational Improvement, • Lee Piekarz, System leader of Decision Support <p>Truven:</p> <ul style="list-style-type: none"> • Aaron Brooks • Allison Sampson • Phil Gaughan 			
Opportunity Stage	<input checked="" type="checkbox"/> Identified	<input type="checkbox"/> Validated	<input type="checkbox"/> Qualified	<input type="checkbox"/> Conditionally Agreed

Meeting Goal

By the end of the meeting, what decision and/or action by the customer do you want to enable? The goal should be stated from the customer's perspective and written in a way that you would feel comfortable saying it to them directly. This goal should be incorporated into your pre-conditioning email as well as your opening comments for the meeting.

Say: Thanks for making this time available for us to get re-acquainted and discuss your Decision Support needs and priorities for this year. We're looking forward to the conversation. By the end of the meeting we would hope to have shared enough information for you to decide if our capabilities match your needs well enough that you would want to invest more time evaluating our performance benchmarking solutions.

Belief points

What will the customer need to believe to reach the meeting goal above?

	Belief Points	What will we do to enable/support these?
1	We need a benchmarking tool to set achievable targets.	<p>Believe! They have a data warehouse which is in the final stages of being built by Kauffman Hall. They have loaded 2015 data and will be loading 2016 data and will continue to load data on an ongoing basis. They describe as a cost accounting system with reimbursement and cost information. It doesn't have benchmarks for any type of decisions. The value they see in the KH tool is that all their data will finally be in one place.</p> <p>Right now, they are looking to make Service Line changes from both a strategic planning objective to an operational prospective.</p> <p>Discovery questions about current target setting process, importance of front line manager buy-in to ensure success, and the importance of providing accurate, relevant comparisons to set achievable targets.</p>
2	Truven's tools meet our needs better than our alternatives.	<p>They believe! They feel that Premier is not set up well and there are too many issues with the data. If they were to stay with the tool they would have to rip it out and reimplement it. All the Executives as well as Bryan and Lee have used AOI and are comfortable with the data both generic and hospital specific.</p> <p>Discovery questions on current solutions in place or being evaluated, discussion of recent client successes, and if needed, discussion of client reasons for changing out competing solutions (possibly THR, Avera)</p> <p>Truven works with about 18 consulting firms who looked at the other tools out in the market including Premier, iVantage, and (Brady and Associates) and selected AOI as their tool of choice</p> <p>Redline with Avera and THR who were Premier clients who are now looking at Truven. We are deferring part of payment to start implementation now. We have 80 Premier members who participate in AOI, we have heard that the Premier tool is not as good for large hospitals or academic hospitals.</p>
3	Truven has the resources necessary to be a good partner for this project	<p>They believe! Both Bryan and Lee have used ActionOI before in the work they have done. Lee has used AOI at Deloitte to help hospitals improve. He has only used the generic data and thinks that it can be used as soon as March to start to develop Service Line changes over the summer.</p> <p>Discussion of client success at similarly situated organizations (Advocate, ChristUS Health (don't mention specifically because it is only one hospital in</p>

	<p>the system, not the whole system) – Better Systems to identify are HSHS in Central IL, St Luke’s Health System in KS.</p> <p>All Academic Medical Centers use AOI though Vizient. Northwestern Memorial, University of Chicago, University of IL Medical Center, Loyola University. Rush University Medical Center. (Do not provide in writing but we can verbally communicate.)</p>
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Questions

Focus on robust questioning that will identify the customer’s needs, what specific problems they need to solve, and what results they need to produce. As you think through these questions, try to anticipate the specific questions your customer will ask you as well as the questions you would like to ask the customer.

- Review the [Qualifying Questions](#) document.

Obstacles

What can get in the way of the customer reaching the meeting goal?

- Review the [Objection Handling](#) document.

Next Steps

What Next Steps might you suggest to the customer at the end of the meeting?

1. Consider building a contract that will help meet their needs of getting generic AOI data in their hands ASAP, but we don’t want to make that the end in mind.
2. Deeper dive into implementation process and backing in to dates to support the 2018 target setting process.
3. Keep Lee in the loop on what Truven can provide him for his data warehouse and to help his data be valuable at Presence Health.

Pre-Conditioning Email and Agenda

Use this [email template](#) to create your own agenda for the meeting. Be sure your agenda ties directly to the goal of the meeting.

Table 2: Email Template

<ol style="list-style-type: none"> 1. Introduction 2. Discuss your current thinking on 2017 performance improvement targets and how you plan to address them. 3. Discuss your current solutions and future needs for data and tools to support these efforts. 4. Share a bit about the Truven solutions and recent client successes. 5. Point out ROI as a key differentiator. 6. Summarize and determine if it makes sense to continue discussions.
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