Stakeholder Analysis for MOC Program Sponsors

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Continuous Improvement Specialist Lead
MOC Program Co-Lead
Learning Objectives and Plan for Session

Learning Objectives
• Explain purpose and thought process of stakeholder analysis
• Identify different types of stakeholders
• Map stakeholders to determine best management approach
• Create stakeholder analysis table for an MOC program

Plan for Session
• Work through steps of a stakeholder analysis
• Practice using the tools
• Reflect on how to apply learning
Write Down Names of 3 Stakeholders of Your MOC program
Jeanne’s List of 3

Steve: Chief Quality Officer, Michigan Medicine

Anita: Fellowship Director, Sleep Medicine

Kevin: Education Manager and Lean Coach, Performance Improvement
Stakeholder Engagement: Process

- Identify Stakeholders
- Assess Needs and Concerns
- Map Stakeholders
- Create Stakeholder Plan
- Carry Out the Plan
Stakeholder Engagement: Process

- Identify Stakeholders
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Analysis Phase
Planning
Implementation
## Stakeholder Analysis Table

<table>
<thead>
<tr>
<th>Name/Role (Individual or Group)</th>
<th>Stakeholder Type</th>
<th>Needs/Concerns</th>
<th>Approach to Managing</th>
<th>Engagement Level</th>
<th>What would we like them to do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder #1</td>
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<td>Stakeholder #2</td>
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<td>Stakeholder #3</td>
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<td>Stakeholder #4</td>
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<td>Stakeholder #5</td>
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What’s the Value?

Stakeholder analysis will help you:

• Engage the right people in support of your MOC program
• Communicate more effectively and systematically with key stakeholder groups
• Encourage wider-spread cooperation with your program
• Better understand and meet your customers’ needs
• Gain the resources you need for your program to succeed
• Maximize the chances of program success!
Stakeholder Management Engagement: Principles

Stakeholders should expect to:

• Have a say in decisions about actions that affect them
• Have their contributions listened to and influence program design
• Have input in designing how they participate
Stakeholder Engagement: Process

1. Identify Stakeholders
2. Assess Needs and Concerns
3. Map Stakeholders
4. Create Stakeholder Plan
5. Carry Out the Plan
Who is a Stakeholder?

“Key individual or groups who are impacted by the program or who are critical to the success of the program”.

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<td>D</td>
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</tbody>
</table>

Enter names and role into first column
Jeanne’s Table

<table>
<thead>
<tr>
<th>Name/Role</th>
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<tbody>
<tr>
<td>Steve</td>
</tr>
<tr>
<td>Chief Quality Officer</td>
</tr>
<tr>
<td>Anita</td>
</tr>
<tr>
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<tr>
<td>Kevin</td>
</tr>
<tr>
<td>Education Manager</td>
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</table>
Identifying Stakeholders: Tips

Think broadly!
- Consider all areas & people the program affects
- Be inclusive and diverse
- Include relevant interest groups
- Identify opinion leaders & empowered representatives of groups
- Include relevant support services (IT, HR, Facilities...)
- Don’t forget internal stakeholders (program staff...)
Identifying Stakeholders: Broad and Diverse

- Improvement Project
  - Clinical Champions
- MOC Program Staff
- Improvement Specialists & Project Managers
- Health System Administrative Leaders
- Specialty Boards
- ABMS Portfolio Program
- Chief Medical Officer
- Chief Quality Officer
- MOC Office Personnel
- Clinical Department Chairs
- Physicians needing Part IV
- Medical School Education Leaders
- Quality Committees
- External Customers
- Department & Division Quality Leads
Identifying Stakeholders: Types

- **Primary** stakeholders: those *directly affected* by the program in a substantive way
- **Secondary** stakeholders: those who are *indirectly affected*
- **Key** stakeholders: those who have *significant influence* upon the program, or *importance within* the organization
## Stakeholder Analysis Table

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**Categorize and enter your stakeholders’ type**

- Primary = Directly and substantively affected
- Secondary = Indirectly affected
- Key = Significant influence or importance
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<td>Key</td>
</tr>
<tr>
<td>Chief Quality Officer</td>
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<tr>
<td>Anita</td>
<td>Primary</td>
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<tr>
<td>Fellowship Director</td>
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<td>Kevin</td>
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Stakeholder Engagement: Process

- Identify Stakeholders
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Defining Stakeholder Needs and Concerns

- Talk directly to your stakeholders ---don’t rely exclusively on email or surveys
- Discover what they require from the program
- Learn their communication preferences and what information they want from you
- Ask their opinions
- Listen to their concerns --- and be prepared to respond
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Enter needs and concerns
<table>
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<tr>
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<th>Needs/Concerns</th>
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<tbody>
<tr>
<td>Steve</td>
<td>• Success = satisfied Clinical Department chairs &amp; Dept. QI leads</td>
</tr>
<tr>
<td>Chief Quality Officer</td>
<td>• No complaints from customers</td>
</tr>
<tr>
<td></td>
<td>• Robust improvement work, aligned with institutional QI/PS priorities</td>
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<td></td>
<td>• Reputational enhancement</td>
</tr>
<tr>
<td>Anita</td>
<td>• Easy-to-use forms and instructions</td>
</tr>
<tr>
<td>Fellowship Director</td>
<td>• Timely turnaround of document reviews</td>
</tr>
<tr>
<td></td>
<td>• Measurement consultation on setting project targets</td>
</tr>
<tr>
<td>Kevin</td>
<td>• Program materials using QI model consistent with model being taught by PI Department staff</td>
</tr>
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Stakeholder Engagement: Process

1. Identify Stakeholders
2. Assess Needs and Concerns
3. Map Stakeholders
4. Create Stakeholder Plan
5. Carry Out the Plan
Stakeholder Map

- Power
  - Low
  - High

- Interest
  - Low
  - High
Stakeholder Map

- Keep Satisfied
- Manage Closely
- Monitor
- Keep Informed

interest (Low)  
| Power (High) | Keep Satisfied | Manage Closely |
| Low | Monitor | Keep Informed |

High
Stakeholder Map
Map Your 3 Stakeholders

The diagram shows a matrix with axes for Power (vertical) and Interest (horizontal). The quadrants are labeled as follows:

- Low Power, Low Interest
- Low Power, High Interest
- High Power, Low Interest
- High Power, High Interest
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Enter management approach in table
- High Power/High Interest: Manage Closely
- High Power/Low Interest: Keep Satisfied
- High Interest/Low Power: Keep Informed
- Low Power/Low Interest: Monitor
Jeanne’s Stakeholder Map

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<td>Keep Informed</td>
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<td>Kevin Education Manager</td>
<td>Monitor</td>
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Stakeholder Engagement Scale

Unaware | Negative | Neutral | Positive | Champion
Stakeholder Engagement Scale

Stakeholder Name

C=Current Level of Engagement
D=Desired Level of Engagement
Stakeholder Engagement Scale

Unaware | Negative | Neutral | Positive | Champion

Assess the current and desired engagement level of one of your stakeholders.
Stakeholder Engagement Scale

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Unaware</th>
<th>Negative</th>
<th>Neutral</th>
<th>Positive</th>
<th>Champion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve</td>
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<tr>
<td>Anita</td>
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Enter current (C) and desired (D) engagement level into next box.
Stakeholder Engagement: Process

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Planning
Stakeholder Engagement: Plan Elements

1) Desired Actions: What would we like stakeholders to do?
2) Engagement Activities: How will we engage them?
3) Communications Plan: How will we communicate with them?
   - Key Messages
   - Communication Channels
   - Cadence
What would we like them to do?

Sponsors/Funders
• Set overall direction
• Provide adequate level of resource support
• Provide advice feedback on strategy and goals
• “Barrier Bust”

Customers/Users
• Promote program with leadership
• Promote program with peers (or be less negative!)
• Become a power user & teach others
• Provide feedback on design of program

Strategic Partners
• Partner and collaborate
• Provide critical support services
• Provide expertise
Engagement Activities

• Information Sharing and Marketing
  - Meetings (1 on 1)
  - Presentations (Groups)
  - Updates
  - Publications (Electronic and Print)
  - Web and Social Media

• Consultations/demos in customer’s workplace
• Attending project team sessions
• Leveraging influence of positive stakeholders
# Communications Plan

<table>
<thead>
<tr>
<th>Audience</th>
<th>What would we like them to do?</th>
<th>Key Messages</th>
<th>Communication Channels</th>
<th>Frequency</th>
</tr>
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![Diagram of communications process: Encoding, Message Channel, Decoding]

*Message*: Sender ➔ Encoding ➔ Message Channel ➔ Decoding ➔ Receiver

*Noise*: Perturbations and interference that affect the message transmission.
Stakeholder Engagement: Process

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Implementation
PDCA of Stakeholder Engagement Plan

- Monitor progress to plan
- Check to see if you got the desired results
- Adjust the plan
Reflection

• Any insights or “aha” moments about your program’s stakeholders?
• What one tool or tactic will I try out when I get back home?
Questions?

Thank You for Coming!

Contact: jkin@umich.edu