Successfully Engaging Stakeholders to Achieve Needed and Desired Change

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Intended Learning Outcomes

• **Outcome 1**: List Kotter’s eight steps for successful change

• **Outcome 2**: Describe Roger’s Innovation Adoption Curve and discuss the implications for change management

• **Outcome 3**: Explain the four categories of stakeholders in a stakeholder engagement matrix

• **Outcome 4**: Develop strategies for engagement with influential stakeholders in a self-selected change scenario in pharmacy education
Schedule

• Presentation and discussion of three “tools” (30 minutes)

• Small group work applying the tools to real-life, self-selected change management scenarios (45 minutes)

• Report-back and discussion (15 minutes)
Who wants change?
Who wants to change?
Change and Quality Improvement

• Quality improvement requires change
• In some ways, pharmacy practice and education are undergoing unprecedented change, but ...
  • Leaders and innovators are looking for opportunities for change to introduce new ideas, models, products, etc.
  • Sometimes needed change is either not achieved, not pervasive, or takes place too slowly
  • As a result, many leaders in the pharmacy profession are frustrated
• How can we adopt better strategies to improve our chances of success?
Change Management

“The systematic approach and application of knowledge, tools and resources to deal with change”*

*Society for Human Resource Management, April 2018
https://www.shrm.org/resourcesandtools/tools.../managingorganizationalchange.aspx
Change Management / Stakeholders

- Defining and adopting strategies, structures, procedures and technologies to start and achieve changes in external conditions and the professional environment
- Extremely important to **overcome the resistance to change** and to **build consensus among stakeholders** on specific changes designed to better meet their needs
- Planning, testing and implementing all aspects of the transition should include **engaging, informing and/or monitoring different stakeholders**, depending on their influence, importance, and level of support/interest in the change specifically and the pharmacy profession in general.
The Eight Step Process of Successful Change


See also: www.ouricebergismelting.com
The Eight Step Process of Successful Change

Set the Stage

1. Create a Sense of Urgency
   Help others see the need for change and the importance of acting immediately

2. Pull Together the Guiding Team
   Make sure there is a powerful group guiding the change – one with leadership skills, credibility, communications ability, authority, analytical skills, and a sense of urgency.
The Eight Step Process of Successful Change

Decide What to Do

3. Develop the Change Vision and Strategy
   Clarify how the future will be different from the past, and how you can make that future a reality.
The Eight Step Process of Successful Change

Make it Happen

4. Communicate for Understanding and Buy In
   Make sure as many others as possible understand and accept the vision and the strategy.

5. Empower Others to Act
   Remove as many barriers as possible so that those who want to make the vision a reality can do so.
The Eight Step Process of Successful Change

Make it Happen

6. **Produce Short-Term Wins**
Create some visible, unambiguous successes as soon as possible.

7. **Don’t Let Up**
Press harder and faster after the first success. **Be relentless** with initiating change after change until the vision is a reality.
The Eight Step Process of Successful Change

Make It Stick

8. Create a New Culture
   Hold on to the new ways of behaving, and make sure they succeed, until they become strong enough to replace old traditions.
Roger’s Innovation Adoption Curve

Categories of Adopters

- Innovators 2.5%
- Early adopters 13.5%
- Early majority 34%
- Late majority 34%
- Laggards 16%
Rate of Adoption

• Relative speed with which members of a social system adopt an innovation

• Measured by the length of time required for a certain percentage to adopt an innovation

• There is a point ("tipping point") at which an innovation reaches critical mass = self-sustaining
Strategies to Reach Self-Sustaining Change

- Adopted by a highly respected individual (or organization), creating an **instinctive desire** for a specific innovation
- Inject into a group of individuals who would readily use an innovation, and provide positive reactions and benefits for early adopters
Roger’s 5 Factors

1. Relative Advantage
   How improved an innovation is over the previous generation

2. Compatibility
   Level of compatibility to be assimilated into an individual’s life

3. Complexity/Simplicity
   Unlikely to adopt if perceived as complicated or difficult to use

4. Trialability
   If able to test, more likely to adopt it

5. Observability
   If visible, will drive communication among personal networks and create more positive or negative reactions
Successfully Engaging the Stakeholders
Stakeholders

*Stakeholders* are people or organizations with a direct or indirect interest in the process and outcomes of the exercise or project, whether positive or negative.

A stakeholder should also be thought of as "any individual or group who can *affect* or *is affected by*, the actions, decisions, policies, practices, or goals of the project"
Who are the Stakeholders?

- When considering **Education** and **Practice**, the list of stakeholders could get quite long!
- You will identify the major stakeholders later.

Graphic from the FIP Global Framework for Quality Assurance of Pharmacy Education
Involvement of Stakeholders

- For each stage of the project it is essential that all key stakeholders are given the opportunity to participate, e.g., in planning and decision making.

- Stakeholders will differ in a number of important characteristics:
  - Motives
  - Needs
  - Interests
  - Expertise
  - Resources
Involvement of Stakeholders

• Not all stakeholders are “equal”

• “Key” stakeholders are those which can significantly influence, or are important to the success of the project

• It is necessary to prioritize efforts to ensure that energy is directed at the most appropriate stakeholders
Key Differences between Stakeholders

• Mission, vision and values – each is unique and this will influence their attitudes and behavior

• Motives for being involved – e.g. economic, power, status, legal, professional

• Type of contribution - e.g. positive or negative, short term or strategic, enthusiastic or sporadic
Key Differences between Stakeholders (cont’d)

• Ability to contribute to the process – e.g. knowledge, skills, resources, power etc.

• Ability to influence process or outcome e.g. power derived from expertise, law, status

• Incentives to contribute enthusiastically or sporadically – material, solidarity, vision, purpose
Influence

The **power** of the stakeholder to **facilitate or block** change
Importance

- Every stakeholder has problems, needs, and interests that are important to the success of the project
- Importance is the relative priority attached to these issues by the stakeholder

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Supporting or Resisting Change?

- Not all stakeholders will have positive attitudes to the project (change)
- Some will want to maintain the status quo and will participate in order to ensure that their point of view is heard and even resist or block change
Positive Stakeholder Relationships

- Early agreement of the need to **work together** to deliver results
- **Meetings** to establish project parameters, success criteria and potential constraints or barriers
- **Review and agreement** on key issues
- Early “flagging” of problems
- **Constant updates** on progress
Match Strategy to Stakeholder

- Influence/Power
- Interest/Support
Strategy Engagement Matrix

<table>
<thead>
<tr>
<th>SUPPORT/INTEREST</th>
<th>LOW</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>4. Monitor (control)</td>
<td>3. Acknowledge (inform)</td>
</tr>
<tr>
<td>HIGH</td>
<td>2. Manage (consult)</td>
<td>1. Involve (partner)</td>
</tr>
</tbody>
</table>

How influential? How affected?

Engagement Strategies

1. Involve = Partner

If they are **supportive and influential**, they should be closely involved with the project
Engagement Strategies

2. Manage = Consult

If they are influential but not supportive, they need to be closely managed. The aim is to increase their level of support. For example, identify the benefits that they could derive from the project and plan on how those benefits can be sold to the stakeholder.
Engagement Strategies

3. Acknowledge = Inform

If they are **supportive but of little influence** they could provide a distraction. They should be acknowledged, kept informed and monitored for changes in their level of support or importance.
Engagement Strategies

4. Monitor = Control

Those who are **neither supportive nor influential** should be monitored to ensure that their level of importance does not change, but otherwise should not distract the team.
Group Work
Workshop Exercise:

• Think about a significant change or project that you want to make in your institution, organization, or country, for example:
  • Introducing a new CE/CPD model
  • Introducing a new service (medication therapy management, immunization)
  • Introducing/changing a regulation
  • Your own “real life” example

• Plan for the change using 6 of the steps of the “8 Steps Model”
• Describe how change might progress using Roger’s Adoption Curve
Who are the Key Stakeholders?

• Make a list of all key stakeholders to be considered in your project or desired change

• Place each stakeholder on the Engagement Matrix

• Identify the top 3 – 4 “key” stakeholders in each category of the matrix

• Why are they “key”? Discuss.

• What is their interest and/or influence? Discuss.
Stakeholder Engagement Strategies

• For Categories 1 and 2 (high influence/power), develop an engagement strategy for the top 2 – 4 “key” stakeholders

• Develop engagement strategies for other stakeholders in Categories 3 and 4 (time permitting)

• Share results with the whole group
Report-Back from Groups
Commitment to Change: Bridging the Gap between Good Intentions and Real Change
Commitment to Change

As a result of this workshop, what are you committed to change?
Any Questions?
CTS References


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