

Bedside Learning Coordinator Role: Engagement and Influencing

Guidebook

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Introduction

Stakeholder engagement and communication is an integral part of any improvement project this is a key part of quality improvement for change to happen. Spreading and adopting improvement work within the healthcare setting is a key part of improving the quality and safety of care provided to our population. Communication and engagement at all levels is a crucial part to ensure these improvements are made and adopted.

When is the right time to engage?

Project Phase	Stakeholder Engagement
Start out	Identify and communicate with stakeholders. Engage key individuals.
Define and scope	Understand where you are now – using stakeholders.
Measure and understand	Get to the root cause of the problem – including patient and staff perspective.
Design and plan	Agree who takes responsibility for what – who is involved with each element.
Pilot and implement	Carry out and test the change(s) – understanding impact on stakeholders.
Sustain and share	Post project review to identify what went well and what could be improved.

Who are the stakeholders?

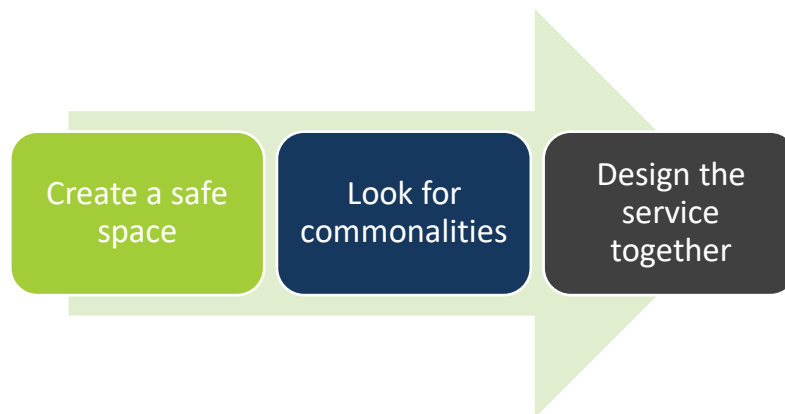
9C Model

1. **Commissioners:** those who pay the organization to do things
2. **Customers:** those who acquire and use the organization's products
3. **Collaborators:** those with whom the organization works to develop and deliver products
4. **Contributors:** those from whom the organization acquires content for products
5. **Channels:** those who provide the organization with a route to a market or customer
6. **Commentators:** those whose opinions of the organization are heard by customers and others
7. **Consumers:** those who are served by our customers: ie patients, families, users
8. **Champions:** those who believe in and will actively promote the project
9. **Competitors:** those working in the same area who offer similar or alternative services.

Build a shared purpose

- **Our:** Who defines the benefit we're after? Who is going to make it happen and who is it going to affect it? All these people need to be involved in designing and delivering change.
- **Shared:** We all have individual values, experiences, beliefs and aspirations. We need to discover where these overlap. What is it we share? We can only find out by talking to each other.
- **Purpose:** This is the "WHY" not the "what" or the "how" of change. It is where vision, values and goals meet and create energy and commitment.

How do we create a shared purpose?



Building share purpose

Identifying your stakeholders

Involving key groups and understanding and acting on their perspectives will help to ensure that the changes are sustainable and will produce the best outcomes.

Identify your stakeholders

Identifying all your different stakeholders can require a good deal of research.

- Bring together a group of individuals who work within the system and understand all the key linkages within the system.
- Build a list of all the people and groups likely to be affected by the proposed change.
- The list should be recorded and use as a term of reference throughout the life of the project.

Prioritising your stakeholders

Once you have the list of stakeholders, you should categorise the list.

- Plot each name or group on a power/impact matrix.

- Consider how they are affected by the project or change to determine the level assigned to that person for project success. In doing this you will be able to identify which stakeholders will require the greatest involvement to those with only require to be informed about the change.
- The more important the stakeholder is to the success of the project, the more time and resources you need to devote to maintaining their involvement and commitment.
- Patients often fall into the 'inform' category.
- It may be helpful to take steps to increase their influence by organising them into groups or encouraging patients to become actively involved in any consultation (see appendix for stakeholder analysis).

Understanding your stakeholders

You now need to know more about your key stakeholders: how are they likely to feel about and react to your project?

- Need to know how best to engage and communicate with them.
- Often the best way to find out is to talk to your stakeholders directly.
- People are usually quite open about their views - asking their opinions can be the first step in building a successful relationship with them.

Managing your stakeholders

- From the stakeholder mapping and analysis, the project team can devise an action plan that sustains supporters' interest and commitment and wins around doubters.

Stakeholder analysis

What is it?

Actively engaging a wide variety of people such as clinicians, administrative staff, patients and user groups will help you deliver your change project. A stakeholder analysis enables you to identify everyone who needs to be involved and assess how much time and resource to give to maintaining their involvement and commitment.

When to use it

Carrying out stakeholder analysis as an early step in your change project can help you avoid conflict and delays caused by inadvertently failing to involve key people.

How to use it

1. Identify your stakeholders

Start by brainstorming a list of all the people and groups likely to be affected by the proposed change. You could bring a small group of well-informed people together to do this or start the list yourself and share it with others so that they can add to it. Grouping your stakeholders according to the following '9 Cs' will help to ensure you have included all relevant stakeholders:

- commissioners: those who pay the organisation to do things
- customers: those who acquire and use the organisation's products
- collaborators: those with whom the organisation works to develop and deliver products
- contributors: those from whom the organisation acquires content for products
- channels: those who provide the organisation with a route to a market or customer
- commentators: those whose opinions of the organisation are heard by customers and others
- consumers: those who are served by our customers: ie patients, families, users
- champions: those who believe in and will actively promote the project
- competitors: those working in the same area who offer similar or alternative services.

As this classification system came from industry, you may find that some of the categories have crossover when grouping stakeholders from a health and care perspective. Don't be too strict with your classifications, the list helps you look for the broad range of possible stakeholders who may be involved in your project.

2. Prioritise your stakeholders

Once you have generated the list of names, analyse it in terms of power, influence and the extent to which they are affected by the project or change. Write each name into the relevant sector of either a four or nine sector table:

Four sector table

High power	Satisfy Opinion formers. Keep them satisfied with what is happening and review your analysis of their position regularly	Manage Key stakeholders who should be fully engaged through communication and consultation.
Low power	Monitor This group may be ignored if time and resources are stretched.	Inform Patients often fall into this category. It may be helpful to take steps to increase their influence by organising them into groups or taking active consultative work.
	Low impact	High impact

Having identified the stakeholders, prepare a readiness for change matrix to see who is for or against the proposals. This will also help you define any influencing activities that might be needed.

Readiness for change matrix

Name/ area/ team	In favour	Neutral	Opposed
	Movement needed		
	←		
		←	

3. Understand your key stakeholders

How are your key stakeholders likely to feel about and react to your project? What is the best way to engage and communicate with them? Involve your stakeholders in developing your thinking – asking their opinions can be the first step in building a successful relationship with them.

These prompts will help develop your understanding:

- What financial or emotional interest do they have in the outcome of your work? Is it positive or negative?
- What motivates them most?
- What information do they want from you?
- How do they want to receive information from you? What is the best way of communicating your message to them?
- What is their current opinion of your work? Is it based on accurate information?
- Who influences their opinions generally and who influences their opinion of you? Do some of these influencers therefore become important stakeholders in their own right?
- If they are unlikely to be positive, what might convince them to support your project?
- If you don't think you will be able to convince them, how will you manage their opposition?
- Who else might be influenced by their opinions? Do these people become stakeholders in their own right?

4. Building trust with your stakeholders

In order to work most effectively with your stakeholders, it is vital to understand their goals and expectations for the change work from their perspective. This enables you to form and build trusting relationships and share values with your stakeholder group in order to work most effectively. To build trust with others, there is a range of actions and behaviours that are important to demonstrate:

- have empathy with others
- be straightforward
- admit mistakes
- keep promises
- show vulnerability (when appropriate)
- let go of grievances
- be consistent in thought and action.

Adapted from Keegan (2015)

With understanding and trust comes the knowledge that allows you to challenge your assumptions in order to frame your change in a way that matches the interest of the audience. Thinking about how you frame your messages is vital – it enables you to tailor these messages and deliver them in a way that maximises impact and engagement and how you communicate and engage with your stakeholders.

5. Working with your stakeholders

Analysis without action is not helpful. Consider how to work with your stakeholders to engage their support.

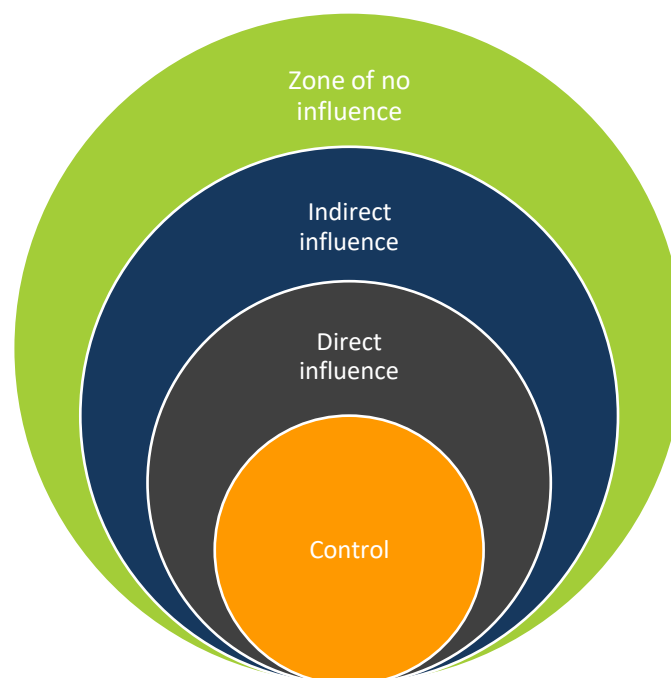
Using the results of their stakeholder analysis, the team designed membership for the project board (see project management) and a communications plan to keep people informed and involved. They tested various aspects of the suggested change by using PDSA cycles.

What next?

Devise a communications plan outlining who needs what information, by which method, how frequently and how progress will be monitored. Brief the project team members on this plan so they know what to expect and how they might be able to contribute.

Written by the ACT Academy for their Quality, Service Improvement and Redesign suite of programme

Spheres of Influence



A sphere of influence is the people you know or who you have access to, who will listen to what you say and be swayed by it. However, there may be people you need to influence to whom you don't have access – they are outside your sphere of influence. Sometimes stakeholders may not necessarily be outside your sphere of influence, but they may not be open to influence from you.

A good way to start when you are thinking about stakeholder engagement is to identify the key stakeholders and try to put them in one of the “spheres”. Consider:

- Those who you can currently influence
- Those you don't have access to

- Those who oppose you
- Those with an agenda of their own
- Those who hold the budget

TIPS

- Spend some time doing this – don't rush or you'll forget someone vital!
- Once you've got your list, revisit it from time to time – people may move into different spheres

Stakeholder Grid

<p>Innovators</p> <p>These individuals are identified as possible champions of your project</p>	<p>Early Adopters</p> <p>Try out your ideas on these individuals in order to get feedback then adapt and modify before going further</p>
<p>Critical Mass</p> <p>These are the individuals you will 'market' to both internally and externally who may currently be on the fence or paying lip service, but may well buy in</p>	<p>Resistors</p> <p>Sideline these individuals for now and focus your energy where it will have the most positive impact</p>

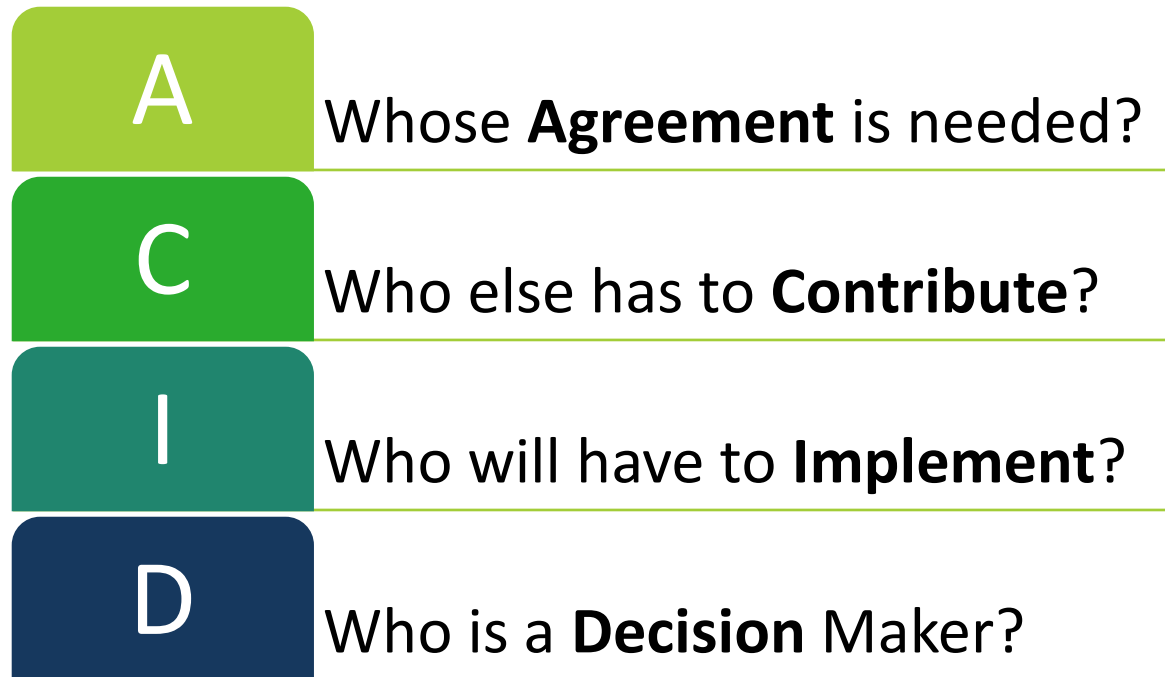
Where are you currently putting your energy?

Where could you put your focus to get the best results?

What would you have to do?

Once you've identified your stakeholders, it's good to do some further categorisation. Similar to the exercise looking at power and impact, try to categorise your stakeholders into one of the four above grids and use this to see where you could usefully spend time and energy and where it will be a wasted effort.

ACID test



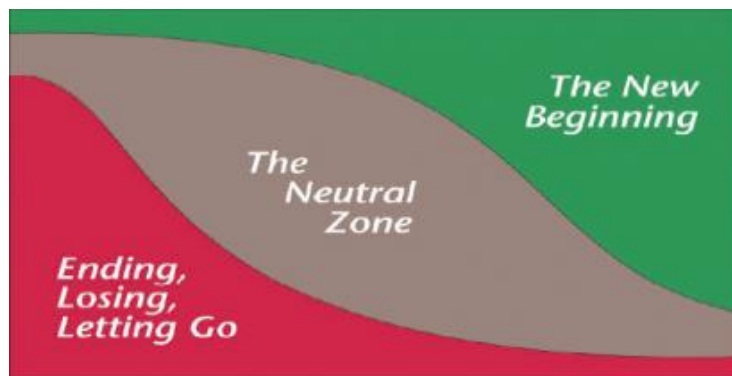
Finally, you can apply the ACID test to your categorised groups, to see if you can further define their roles.

Supporting people through transition

People are often quite uncomfortable with change, for all sorts of understandable reasons. This can lead them to resist it and oppose it.

This is why it's important to understand how people are feeling as change proceeds, so that you can guide them through it and so that – in the end – they can accept it and support it.

Bridges' Transition Model helps you do this.



Understanding what is happening within the different transition stages can help you support people and make the process smoother for them and you.

Transition phase	What's happening	How to make the change work
Endings/letting go	Emotional upheaval: fear, denial, anger, frustration, disorientation, a sense of loss, resistance	Expect & accept a variety of emotions, listen with compassion, communicate again & again, treat the past with respect, be visible, clearly define what's over/what's not
Neutral zone	A time of confusion & even resentment towards the change. Low morale & productivity. Conversely, a great place for innovation & creativity	Provide guidance & direction, encourage more involvement/ownership, continue communicating, increase collaboration, share success stories/ideas, give feedback
Beginnings	The new situation is accepted, energy is high. People are committed and there are signs of success. A new sense of purpose & identity	Link personal goals to organisational goals, paint a picture of the future, create opportunities for quick success, celebrate success

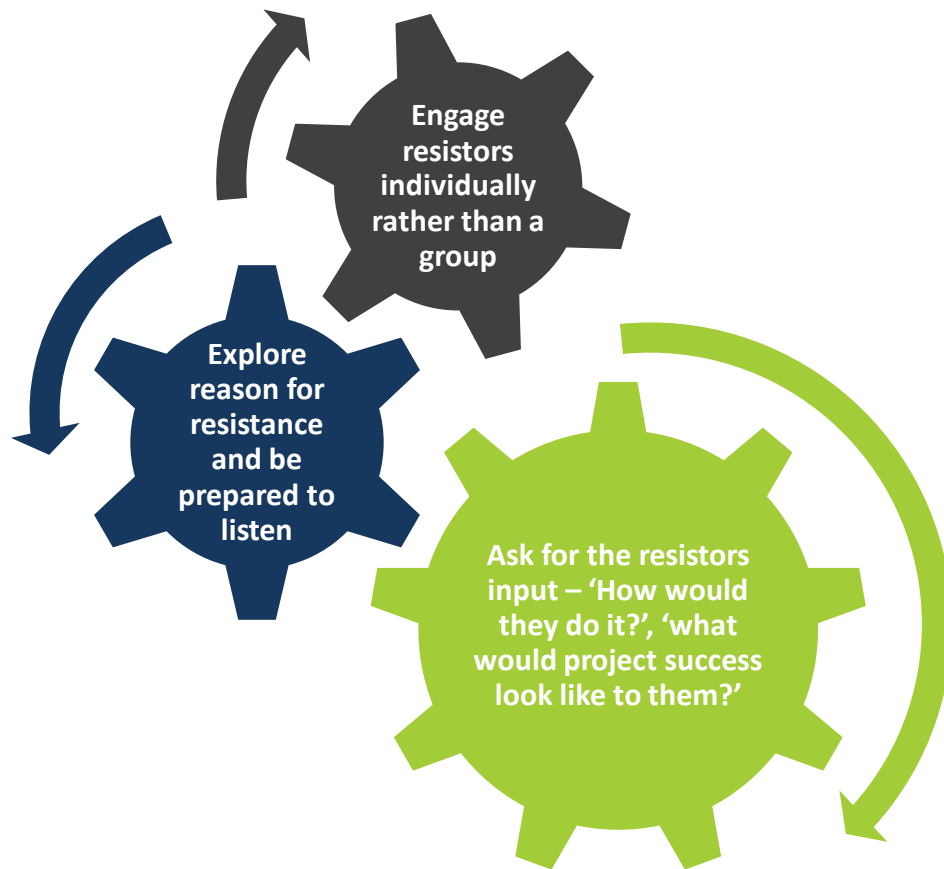
Resistance Behaviours

It is possible that despite all your work engaging the different stakeholder groups and supporting them through the changes that occur because of your project, you will meet resistance from some people. Recognising the behaviours that are associated with resistance can help you to develop strategies for addressing their concerns and minimising delay to your project.

<p>Indirect/ invisible</p> <p>'The submarine below the water line – ready to torpedo your change efforts!'</p>	<p>Behaviour</p> <p>Silence – Do not engage or speak so cannot have the discussion</p> <p>Compliance – very difficult to deal with. They agree 100% with the change but don't want to help or support</p> <p>I'm not surprised – creates a degree of 'I know and could have told you' – usually very eager to tell you this message a lot</p> <p>Pressing for solution – always need to have an answer so never allow the planning / early stage changes to be properly explored</p> <p>Too much detail – need to know every little detail. They always stop the flow by asking so many questions and also answers might not satisfy them</p> <p>One word answer – engagement becomes difficult</p>
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<p>Direct / Visible</p>	<p>Behaviour</p> <p>Avoidance – don't want to take on any of the work. Refusal to perform a task Refusal to plan a task Refusal to consider alternatives</p> <p>Impracticality – suggest solutions that are so impractical they could never be implemented</p> <p>Attacking – common. Attack the person or the idea – never want to accept the rationale.</p> <p>Time – they don't have any time to discuss, so you can never pin them down.</p> <p>Nit-picking – against specific areas of the proposed change. Eg "That will never work because..."</p> <p>Confusion – do not understand the reason for change or what the change involves so you have to constantly go over old ground and lose time/resources. Failure to complete a task Misleading or incomplete information (leading you to believe the information or task is complete)</p>
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Strategies for dealing with resistance



You can also map out how best to approach different individuals or groups using the “What’s in it for me” model (WIIFM).

Key people or group	WIIFM (What's in it for me)	What could they do to support or prevent the improvement initiative?	What could/should we do to reduce non-compliant activities and encourage acceptable ones?				
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b	c						

Communication methods

What is communication?

- Is defined as imparting or exchanging information, thoughts or ideas using speech writing, or some other medium such as signal behaviour
- The act or process of using words, sounds, signs, or behaviours to express or exchange information or to express your ideas, thoughts, feelings, etc., to someone else.
- Most importantly it's a support function to make the hard work of people on the front line make the biggest impact it can!

Principles of good communication

- Honesty and integrity
- Simplicity and clarity
- Continuity – consistent branding and TOV (tone of voice)
- Timely
- Engaging content
- Purpose and meaning
- Audience-targeted
- Responsive

Effective communication

- Effective communication protects patients from potential harm arising from misunderstanding.
 - Enhances the patient experience
 - Reduces complaints
 - Increases buy- in
 - Can help overcome barriers

Different approaches to communication

- **Face-to-Face Communication**
 - Verbal communication
 - Storytelling, meetings
 - Physical nonverbal communication
- **Written Communication - written communication cannot be avoided in the workplace**

- **Visual Communication**

- Twitter
- Pictures
- Posters
- Infographics

The seven types of pitches

- One-word
- Question
- Rhyming
- Subject line
- Twitter
- Elevator
- Pixar

One word	Question	Rhyming	Subject line	Elevator	Twitter
<ul style="list-style-type: none"> • Single word that represents your offering and use it as a punchy tagline 	<p>When facts are clearly on your side, pitching with questions is more effective than pitching with a statement.</p>	<ul style="list-style-type: none"> • Having a catchy line to attract the audience. Kids and grown-ups love it so – the happy world of Haribo 	<ul style="list-style-type: none"> • Most important thing when looking at an email is who sent it. Next is subject line • Research found 3 reasons how people prioritise: <ul style="list-style-type: none"> • Utility (work) • Curiosity • Specificity 	<ul style="list-style-type: none"> • Developing an ‘elevator pitch’ is a great way to refine the key messages about your project • Develop different pitches for different audiences • Target particular people to solve particular problems 	<ul style="list-style-type: none"> • A Tweet that you craft that pitches your project in 280 characters or less It’s a short, pithy summary with a <i>lot</i> of punch.



Communicating using social media

Twitter

@ = Twitter handle

- Use this in a tweet to 'mention' a person or organisation
- Don't include UCLP or UCLPartners in your own Twitter handle

= hashtag

- Use this in a tweet when talking about an event or campaign

Always check first to see if someone or something has a Twitter handle (@) or hashtag
If you're running an event or campaign be sure to include your trust handle

Tweet structure

[Headline][Mentions][Hashtags][Link]

- The link always comes at the end - Use [Bitly](#) to shorten the link
- Try to keep @ and # as part of the headline but if you can't fit them in do the mentions first, followed by the hashtag and link

Best practice to help promote your work

- Republish old content (mainly advice for organisations running websites)
- Use relevant hashtags – you may need to create something original to stand out
- Where relevant, include useful links to signpost followers
- Include a variety of media
 - Links
 - Photos
 - Infographics
 - Video
- Respond to feedback - if it's negative and you're not sure how to respond, ask the communications team

Examples



The image shows three examples of tweets:

- Example 1:** A tweet from UCLPartners (@UCLPartners) dated Mar 21. The text says: "Good to see so many #AHSNs initiatives shortlisted in HSJ #PSafetyAwards [ow.ly/kcgN30a7wE3](#) @WessexAHSN @KSSAHSN @WMAHSN @WEAHSN". It includes a photo of a medical professional in a blue scrubs and mask, and another photo of a patient in a hospital bed.
- Example 2:** A retweeted tweet from Royal Free London (@RoyalFreeNHS) dated Mar 20. The text says: "Want to know more about robotic surgery at the Royal Free? Come along to our symposium on Friday at midday [ow.ly/PRKR30a4CGA](#)". It includes a photo of five medical professionals in blue scrubs standing in a hospital setting.
- Example 3:** A tweet from Charlie Davie (@davie_charlie) dated Mar 10. The text says: "#dementiaaware @UCLPartners great turnout today. Hearing about dementia friendly communities @TimMcLachlan1 @alzheimerssoc". It includes a photo of a speaker at a podium in a large hall, with an audience visible in the foreground.

You Tube

YouTube

- YouTube allows you to easily upload a video that you can embed on your website
- The [UCLPartners YouTube channel](#) has different playlists which help users find relevant content
- In the 'age of impatience' it's important to make use of video in the right way. If you're thinking about creating a video for the website, ask yourself:
 - How long will the video need to be? (Shorter the better)
 - How easy will it be to film and edit? (Depending on what you're trying to achieve, you may need to get professional help)
 - Who is the audience? (Do they use online tools already? Is there a specific group so that the content is better tailored to them?)
 - How will people use the video? (For training? To understand a concept?)

Other social media

- Much more visual than the other channels
- Great way for organisations to share 'behind the scenes' images, e.g. [General Electric](#)
- Easy to add filters to pictures to make them look more professional
- Fun, e.g. [IBM](#)
- Allows for videos of up to 15 seconds



- Popular with teens and young adults
- 'Disappearing content' making online interaction feel more human and grounded in the present moment
- Snapchat Stories enable users to post photos and videos on their channels which can be accessed for 24 hours

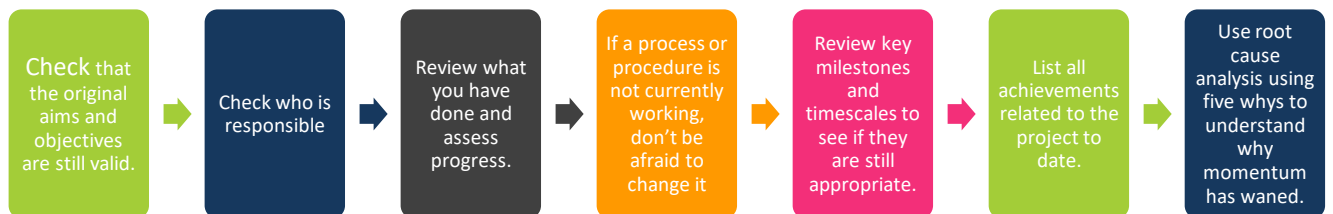
- Very visual platform
- 'Viral' platform - 80% of content is items re-pinned from one board to another
- Patients are using it to engage with their conditions and others with similar
- Promote lifestyle, inform and inspire audiences about your work
- Health focus might be: research; rehabilitation; foods; environment and design; patient stories; safety issues



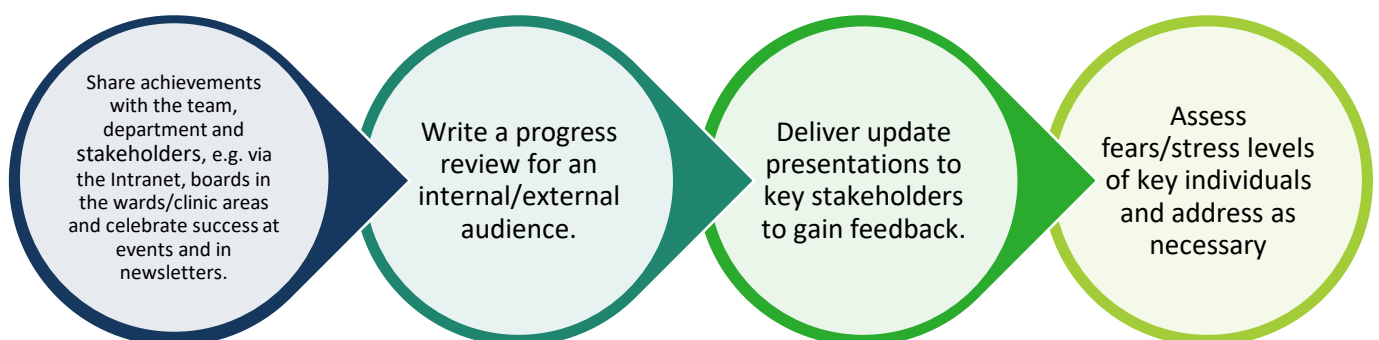
Good communication helps sustain momentum

- The day-to-day pressures on time and resources that we all experience can make it difficult to sustain the initial momentum of a service improvement project.
- Help others reignite interest in the project and maintain commitment to it.
- Enthusiasm for change can be difficult to maintain. The key is communication – keep talking and listening to people throughout the process and share the benefits and impacts of the project.

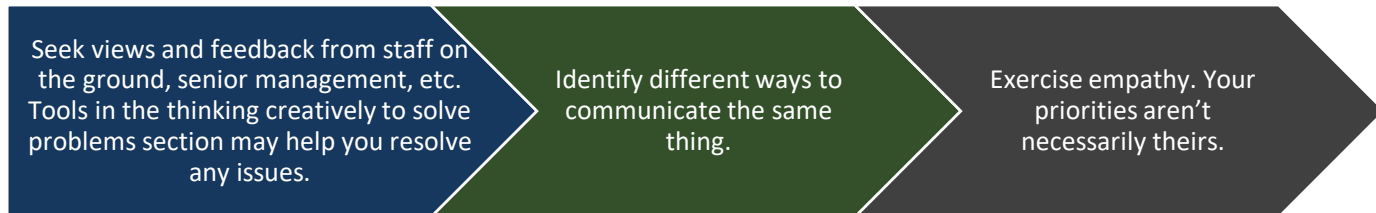
1. Start by reviewing what's going on



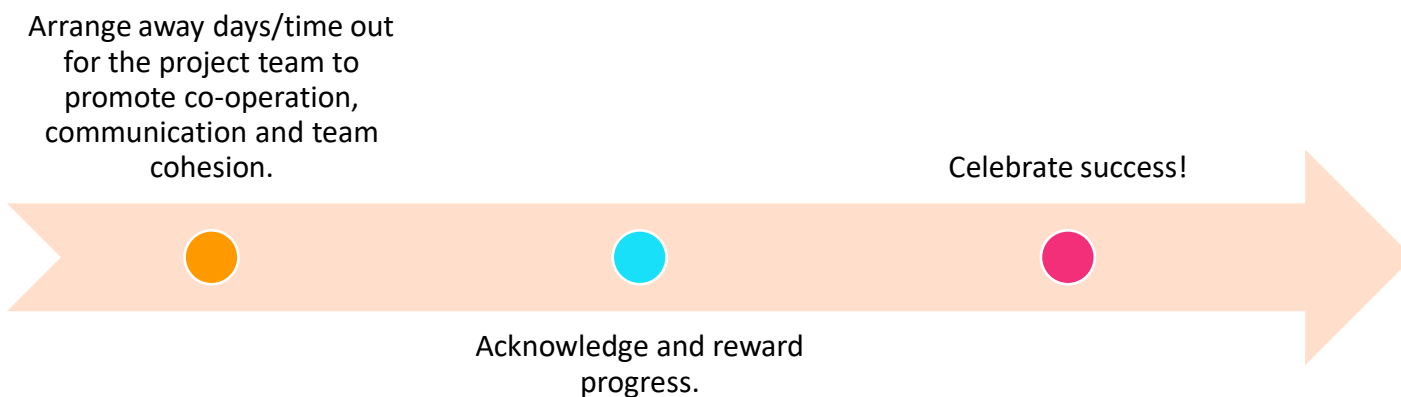
2. Ensure you communicate success with all those involved



3. Listen to others and understand their priorities



4. Think about the team



Another way to think creatively is by using Edward De Bono's **Six Thinking Hats**.

Six Thinking Hats

The Six Thinking Hats are flexible and adaptable to any situation, providing a systematic approach to collaboration, problem solving, strategic planning, and subject or idea evaluation, and much more. The techniques provide a disciplined process for individuals to focus on and assist them in getting to the point. It allows entire teams to look at all sides of an issue thoroughly and without confrontation, which is one of the approaches most important attribute, all in a fraction of the time which other traditional methods may take.

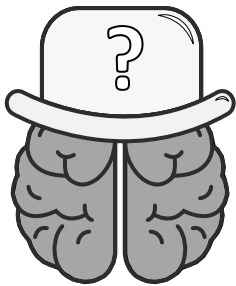
How to use:

In groups choose an idea and discuss using the six thinking hats.

To use the hats, someone in the group will be the leader of the session who will be wearing the blue hat. The person wearing the blue hat will coordinate the flow of conversation and ensuring each hat is using the same hat throughout the discussion. Each hat should get 3 to minutes which will result in a well-balanced view.

To maximise results, your chosen team members, which we worked out earlier today, will all wear a different coloured "hat" and will act based on the hat's approach, whether it is feelings, processes, benefits, cautions etc. You should not wear the hat that you believe suits you and your thinking style

but wear a different style and see how creatively you can think if you channel your thoughts that way.



Information / data needs:

Information and data
Neutral and objective
What do I know?
What do I need to find out?
How will I get the information I need?



Negatives / risks:

Difficulties, weaknesses, dangers
Logical reasons are given
Spotting the risks



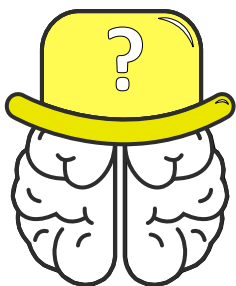
Ideas:

Ideas, alternative, possibilities
Provocation –
Solutions to black hat problems



Emotion / gut feeling:

Intuition, hunches, gut instinct
My feelings right now
Feelings can change
No reasons are given



Benefits / positives:


Positives, plus points
Logical reasons are given
Why an idea is useful



Managing the thinking process:

Thinking about thinking
What thinking is needed?
Organising the planning for action

Edward de Bono's Six Thinking Hats

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