NWD SYSTEM: BUSINESS CASE TOOLKIT

Section 6: Successful Engagement with Potential Partners

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Overview

A strong, long-term relationship, rather than a temporary alignment, is one of the key components for successfully achieving a sustainable partnership for a desired "Ask". Relationship building can be a long process, but the trust built over time can ultimately lead to valuable partnerships.

> **Quick Tip on Relationship Building**
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> A NWD Business Case Collaborative panelist with experience in both the healthcare and legislative arenas emphasized, *"People like to be asked for help. That's part of relationship building."* Rather than initially offering something, you could start a conversation by asking a question such as, "What's important to you?" or "What are the most pressing needs you see in this field?"

Possessing a deep understanding of both the market and your target partner will aid you in confidently explaining why they should work with you. Each of the previous sections of this toolkit will help you prepare to approach a potential partner. Remind yourself of your partner's pain points, unique needs, and goals. Ensure your "Value Add" message, "Ask", specific data points and examples, and presentation style are tailored appropriately to the target audience.

Do This!

Step 1. Reach out to target partners

When reaching out to potential partners, consider what method of communication may be most effective. As a NWD Business Case Collaborative panelists shared, "Old school is incredibly powerful." Making a phone call or sending a handwritten note including your business card and "Ask" can often be much more effective than sending an email.

Some specific strategies for approaching particular audiences include the following:

- Do not overlook or underestimate the role of **state legislative staff**. View staff members as a pipeline that can become your best asset. Become a resource by engaging and providing education. For example, you could share data for specific legislative regions or customize your infographics based on legislative region data or local resources. It may be helpful to conduct one-on-one meetings to establish a working relationship so staffers are more likely to reach out to you for assistance.

> **Snapshot from the 2019 NWD Grantee Business Case Collaborative**
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> Several grantees shared infographics or pitch decks with customizable sections for inputting regional data and local consumer stories. For example, several states plan to make customizable messaging materials and talking points available to partners and advocates for legislative advocacy.

- For **Medicaid-related agencies,** consider the procurement cycle, which drives Managed Care Organizations' (MCOs) policy work and decision-making. Explain why your organization should be a priority by detailing what your organization can do for the agency. Point out the successes your organization has already achieved and how it can help the agency save Medicaid money. Remember to conduct research on the agency to better understand their goals and priorities.

- For **hospitals,** develop a relationship by working through the state hospital association, contacting the hospital directly, or connecting with clinical champions. Select target hospitals based on factors such as your program's goals, funding sources, staffing limitations, and hospital needs.

Step 2. Engage partners in a meeting

During the meeting with your potential partner, demonstrate your commitment by staying engaged and asking questions. Enter the meeting with the goal of developing a long-term relationship. Even if the intended partnership does not materialize in the end, the relationships you build can be useful in the future. For example, you can use existing connections as a resource for referrals. When presenting, establish a rapport with your audience to hold the viewer's attention. Deliver a succinct message that will speak to your audience's priorities.

If possible, bring individuals to the meeting who can "speak the same language" as the audience, or who can share compelling personal stories. Bringing in key partners can also help demonstrate your credibility and the strong relationships you already possess. If it is not possible to bring additional people to the meeting, come prepared with relevant personal stories and examples about the impact your agency has already made. You will notice several of the example marketing tools included in Appendix P include personal story examples.

Continually emphasize how you are different from other agencies and how those distinguishing factors can benefit the potential partner. Keep in mind who your audience is and always assume they are not familiar with specific terminology. Spell out any acronyms that you reference for the first time, even if they seem self-explanatory (e.g., "NWD").

Snapshot from the 2019 NWD Grantee Business Case Collaborative

Georgia's presentation style effectively fostered a rapport with the audience while highlighting compelling data points. The pitch targeted local AAAs, and the presenter emphasized the shared challenge of limited time and resources and the shared goal of helping people receive the services they need. The pitch successfully addressed the need for cost savings by noting that options counseling is cheaper than traditional Older Americans Act (OAA) or Medicaid waiver services, which creates a win for clients, counselors, and agencies.

Quick Tips on Common Language

During the NWD Business Case Collaborative, one panelist stressed the importance of a **common language**: *"Health care professionals listen to other healthcare professionals. Same for social services professionals."* Potential partners with different backgrounds might speak a very different "language" and will tend to listen more readily to peers in the same profession.

Do you have an existing partner in the same field or role as your potential partner? Could you bring this existing partner to the meeting to share the benefits of partnership and help "speak the language"? Bringing an existing partner will also demonstrate your credibility.

Step 3: Follow up with potential partners

Regardless of how a meeting goes or what decisions are made, you should always follow up with your potential partner. Doing so will establish a connection that might be beneficial later on. Personalized forms of communication, such as handwritten notes, are highly regarded. At the very least, send a thank-you email summarizing your commitment and the action steps you are willing to take for your new partner. Appendix N includes an example template to use for post-meeting follow up.

Additional Resources

- Finding Champions and Building Partnerships between CBOs and Healthcare Entities: This webinar highlights the different ways that community based organizations can develop relationships with physician groups, hospitals and health plans.
- Understanding the Incentives and Strategies for Health Systems to Engage in Cross-Sector Partnerships: This webinar touches on strategies for partnership and includes case study examples of partnerships with providers and health plans.