Preparing Your Transplant Center to Work with a Consultant

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The late 20th century phenomenon of the consulting industry is now so pervasive that the organization that has never been visited by a consultant probably no longer exists.

—Julia Vowler, *Computer Weekly*, 9/1/97

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Jasmine Sohaey Grassi, M.S.
Healthcare Marketing & Managed Care Consulting Services
2256 Oakleaf Street
Coralville, Iowa, USA 52241
Tel.: 319.358.2980

There is no doubt that your hospital has already hired several consultants and that they have helped to shape major decisions at administrative levels that may have affected your program. You may have even heard or read about "specialty" consultants who will specifically advise you on your transplant program. These services help you market your program to managed care companies and referring physicians to procure new contracts, better rates, and more patients. A good consultant can improve your marketing materials and enable you to build productive relationships with key people within your own organization, as well as with external decision-makers, who are very much a part of your center's success. Perhaps you have gone so far as to gather specific names from your colleagues and to secure funding to pay for such consulting services. What to do next? Do not hire a consultant!

At least, not yet. Not until you have turned your attention to your own organization and taken the necessary steps to ensure that your transplant center is fully prepared to hire a consultant. If your organization is not prepared to work with a consultant, you could, at best, waste time and money. At worst, you could damage both your team's morale and your standing within your organization.

There are several services worth paying a consultant for help; however, organizing your own people and systems to work with him or her is something that you can and should do yourself. Here is what to do before you hire a consultant:

Create a Business-Oriented "Transplant Team"

This team will work specifically on the plan that you intend to undertake. Your plan, for example, may be to more effectively market your program to key referral sources (usually managed care companies and referring physicians/hospitals). Choose a team captain. This person will not only create and lead the team but will also be appointed the day-to-day liaison with the consultant. This oversight is necessary to avoid going over budget and to ensure that the consultant is receiving one set of consistent signals. This person should be of sufficient rank or influence within the organization that his or her active interest signals that the project is important. In addition, he or she should be politically astute and should be capable of making routine decisions or taking action independently.[1]

Assign Roles

Assign roles to each person on that team, making sure that roles do not overlap. Each person should make a valuable contribution to the team and feel valued, to ensure that no one believes he or she is wasting time. Be clear with your team regarding what you expect from each member. You will most likely have team members from several departments (managed care, marketing, finance, to name a few), so ensure that you have received approval from each team member's supervisor prior to requesting that he or she perform a task for this group. Ideally, the supervisor would have spoken with him or her before this assignment. In fact, including those supervisors is part of the team-building function and may later prove to be critical to the success of your overall plan. Finally, decide which role(s) you want to assign to your consultant. Various roles might be:

Project Manager: Perhaps you will be too busy, either clinically or administratively, to oversee this group on a regular basis (although you should do it initially, and make every effort to be present at all subsequent meetings). Have the consultant come in weekly or biweekly to organize the group and direct or redirect its efforts as appropriate.

Progress Manager: Certain aspects of marketing your transplant center to managed care require a high level of attention. Consider the many activities that warrant attention in the process: completing and/or inviting requests for proposals/requests for information (RFPs/RFIs,)[2] answering clinical surveys/updates, scheduling site visits (either as part of marketing your programs or as part of a contracting initiative), participating in trade shows, getting physicians on the speaker circuit, planning onsite in-services for referring physicians, mailing list management, and "center of excellence" marketing. Add to all this tasks such as strategizing to be accepted in transplant networks, working with marketing departments to create marketing materials, and so on. The consultant can be responsible for initiating and following through each action step to make sure tasks are done according to schedule.

Regular Meetings

This will show your team that you take this group seriously and will also serve to ensure that projects continue to move forward. Plan to make your consultant a part of this team. Things to cover at the first few meetings:

1. The nature of the consulting project and why you see it as important.
2. Your accountability with respect to an existing problem.
3. The benefits of the project.
4. The resources you are committing to the project, such as time.
5. Your expectation of this group's role in decision making.

Create ownership of transplant center development by encouraging group decisions at the regular meetings and considering input from each member of the team. It is, as suggested above, important to have this group involved in the consultant-hiring process. Test out "personal chemistry" between the group and the consultant. There may be individuals who are threatened by the presence of the consultant. Perhaps they are not secure in their jobs or level of performance. They may fear that this person will help to identify their real or imagined weaknesses. By making each person an active participant in the consultant-hiring process, you reduce your chances of having team members resist or otherwise inhibit a productive working relationship. An important goal is to develop relationships within the team by which everyone has a chance to grow, as the center profits. A successful consulting project is a collaboration between clients and consultant. When you and your people support the consultant's efforts, everyone wins.[1]

Perform a Background Check

Consultants differ in their training and experience. Make sure that your candidate has direct experience in the area you are seeking to develop. For example, if your transplant center has several managed care contracts but does not seem to be getting an appropriate amount of referrals, you will want to hire someone with a strong background in marketing/sales/relationship building. This is more sensible than hiring one with a strong financial orientation, or managed care knowledge, because you already have the contracts. On the other hand, if your transplant center needs to educate itself on the finer points of managed care contracting, then hiring someone who has worked on the contracting side of a managed care organization will be a better fit. Ask your consultant candidate if he or she has ever worked in the specific role(s) that you will be assigning him or her, with either a previous employer or another client, and ask about the outcome of that experience.

Organize Your Thinking

Have your team decide what it wants from a consultant and where he or she will fit into the team and within your organization as a whole. Re-examine why you are hiring a consultant in the first place. Your goals must be clearly defined and understood. A thorough review of the typical reasons for bringing in a consultant may aid in this process. Your needs will be more specific than these, but generally clients look to consultants for:[3]

1. Expedient resolutions: A skilled advisor will have the experience and track record to understand a problem and solve it faster, that is, getting information from the proper departments if this information has never been gathered before.
2. Their impartiality: Consultants do not carry internal political baggage, and can focus better on the job at hand. It is important, however, to make sure that the person you select can work well within the greater framework of your organization. This ensures that his or her work fits into the bigger picture.
3. Their expertise: There is no point in hiring permanent staff for skills needed only occasionally. A consultant maintains and improves those skills at his or her own cost and brings to the role a variety of experiences.
4. Cost considerations: Consultant fees, even if high, are not fixed overheads and are usually tightly apportioned to a particular project, making cost justification simpler.
5. As agents of change: the most common use of consultants, who can be brought in for their objective eye.

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Organize Your Information

Each member of your team holds a different piece of the puzzle. Find out who has access to what information. Learning where the different information is, and who can get what to your team, will be an ongoing process within groups that have little or no experience in working on managed care projects. Overseeing this process may be an ideal role for a consultant who has worked with several other transplant centers and may have a better idea where this information typically is kept. Some things you should do before your consultant comes in—both to educate your own team (remember that many of these people will not be clinical staff from your transplant program) and to help the consultant to educate himself or herself—include the following:

1. Compile previously completed RFPs/RFIs as well as clinical survey updates and other forms requested of you by managed care companies or other payers.
2. Gather current and past marketing materials, both program specific and general hospital information.
3. Know your costs, or do your best to gather this information, and ensure its accuracy before the consultant arrives. *Make sure that your consultant signs a confidentiality agreement prior to showing him or her this information.* Compare your costs to your charges and make sure your team understands how the difference affects them.
4. Do a competitive analysis. Decide who your competition is locally, regionally, and nationally. Target areas that you want to pull more patients from, and gather necessary information (United Network for Organ Sharing (UNOS) data, names, marketing materials, histories, etc.) about the other transplant centers in these areas.
5. Provide your consultant (and your team members) with complete listings of your transplant programs, staff bios and CVs, email addresses/phone numbers, and other business card information.
6. Gather and update all managed care information: which organizations you have contracts with, which ones have been renewed recently, which programs are contracted for, and what type of contract it is. Gather information on any managed care contracts that you do not have that you would like to have. If you are able to track past referrals, this is very helpful.

Know Your Organization

Find out what will be approved by senior management and what will be rejected outright. Most large hospitals have very specific ways of proposing and completing major projects, and if a renegade group tries to buck the system, their efforts will often be thwarted by this formal structure. It might even be refused funding for "not following the rules," so find out what the rules are, and what the obstacles might be. Play by the rules, and make sure your consultant is informed enough to do the same. Tell your consultant about political issues; they are a reality of organizational life. In short, make sure that the work your team (and your consultant) will be doing is usable within your own organization once it is completed.

Identify Your Real Needs

After assigning roles and organizing your thoughts, you will have a much better picture of what you want from a consultant. Try to answer the question "What do I want to have or to change once the consultant leaves?" Some of the answers may be more managed care referrals, better outreach to referring physicians, more contracts, better contracts, better internal structure, a more informed clinical staff, and so on. It is important to pick or prioritize what is most important to you so that you do not set yourself (and your consultant) up for failure or run out of money.

Communicate

Begin the habit of organizing and sharing data among team members. Make introductions of financial personnel to clinical staff, of managed care and marketing employees to admissions staff, and so on. Because your team will come from throughout your organization and (ideally) includes several members of different departments, it will be of utmost importance not only to introduce but also to facilitate relationships between different group members. Additionally, set up a system for feedback from your team to the consultant and from the consultant back to the team. Post goals and achievements in a visible place so that everyone on the team can share in a positive feeling of accomplishment and progress. Finally, urge your team members to communicate their concerns about the project(s) as time goes on. Surface these concerns immediately. Unexpressed concerns can take the form of resistance and can undermine the consultant's project.

By following these steps before hiring a consultant, you will not only save time and money for your organization but, more important, you will mobilize an efficient and effective team that a good consultant will further educate and shape. This team will continue to help your transplant center grow in the days to come, long after the consultant has moved on.

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