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HFMA/NEHIA

2022 Compliance & Internal Audit Conference

Wednesday, November 30 - Friday, December 2, 2022
Mystic Marriott Hotel, Groton, CT

Building your compliance brand

Agenda

- Background of BILH and our compliance program
- Developing a compliance program brand strategy
- Measuring effectiveness of brand

Background on BILH Integrity and Compliance

Who we are

Beth Israel Lahey Health is an integrated health system that brings together academic medical centers and teaching hospitals, community and specialty hospitals, more than 4,800 physicians and 36,000 employees in a shared mission to expand access to great care and advance the science and practice of medicine through groundbreaking research and education.

Beth Israel Lahey Health



Our journey as a compliance department

- Existing compliance programs prior to merger at each entity
 - Different compliance and operational technologies, policies, practices, operations, scope
- Among the first departments at BILH to be a designated “system service”
- A focus on developing a system service model

Coming together as an Integrated Shared Service called *BILH Integrity and Compliance*

13 Individual programs

Fear

Uncertain

Varied Maturity

Fractured

One Unified program

Calm

Structured

Driving Maturity

Team



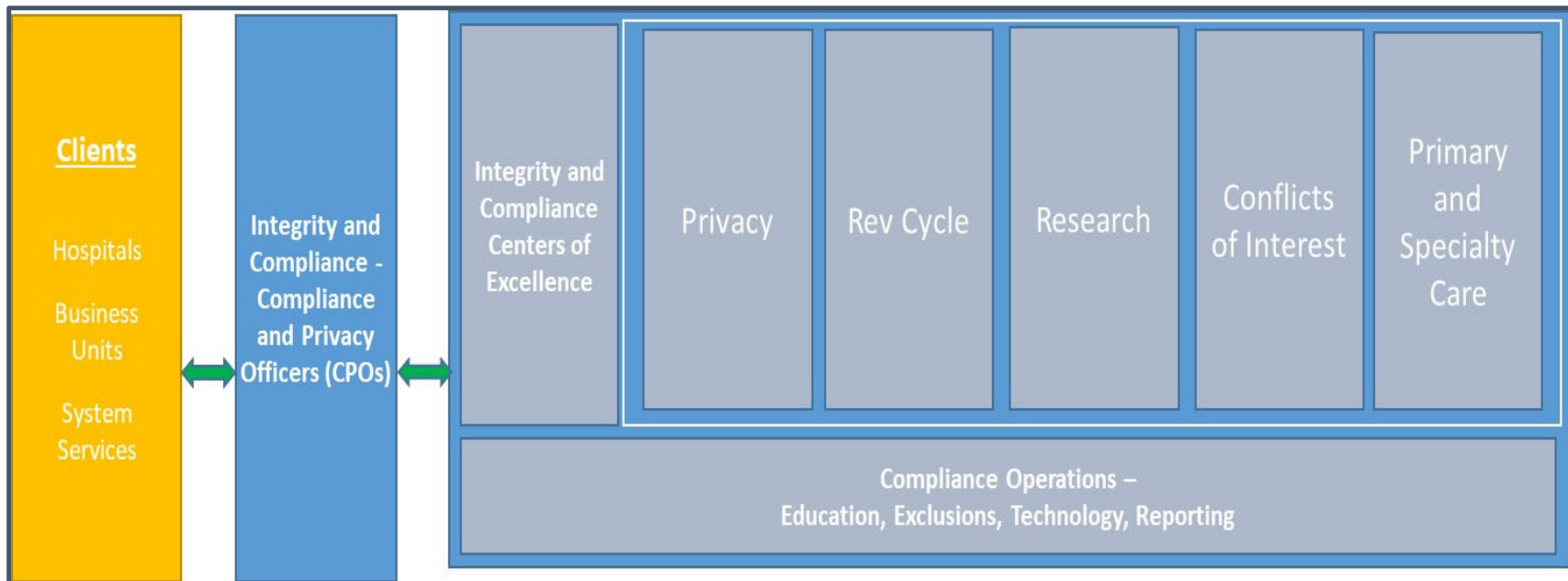
By Frits Ahlefeldt

BILH Integrity and Compliance Vision Statement

- A shared understanding within the department of our purpose, vision and key attributes
- States current and future objectives
- In person and virtual sessions held to frame out our Integrity and Compliance vision:

Vision: We strive to empower our workforce to do the right thing, the right way, every day. We envision a BILH culture of integrity, respect, and collaboration – enabled by expert professionals and technology.

Operating model



Developing your compliance brand

A New Lens to see our Strategy - BRAND

How important is a brand identity?

- It forces you to see yourself through your customer eyes.
- It creates customer loyalty.
- Brands weather business interruptions and storms much better
- Builds Trust

Remember, its more than a logo.

Brand is about connection and reputation.

Brand affects your operational performance.





Poll

Poll Everywhere

- This session will be using Poll Everywhere, an online system for live polling.
- To submit your poll question response, answer by text messaging or answer by URL on your phone, tablet or computer.

Text Message Responses

- To submit answers by text message:
 - Text **BILH2022** to **22333** ONCE
 - You will receive a text message back from Poll Everywhere confirming you have joined the session
 - To answer the poll questions, type in the corresponding letter to your selected answer (A, B, C, etc.)
 - When you're done, reply **LEAVE** to **22333**



Poll

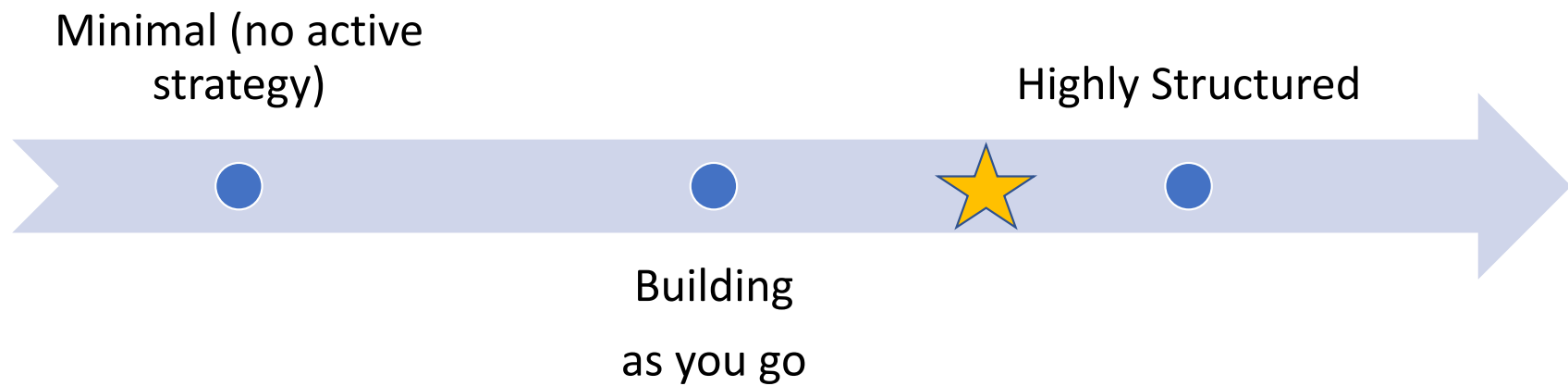
What approach have you taken to define a brand for your department?

A. No thought to branding.

B. Building it as we go.

C. Highly structured approach with strategy, implementation and assessment effort.

Where is our Brand Strategy?



Telling your Message

Marketing

- A “PUSH” tactic where you push your message out to the organization.
- “We are here to help”

Branding

- A “PULL” tactic where you pull stakeholders in the organization towards your team with an invisible connection.
- “They are helpful and competent”

Jeff Bezos - “Branding is what people say about you when you are not in the room.”

What is a “BRAND”?



Your personal experience with products is the best example for understanding how Brand influences us as the customer.

Refer to your phone to take a Brand Recognition Quiz.

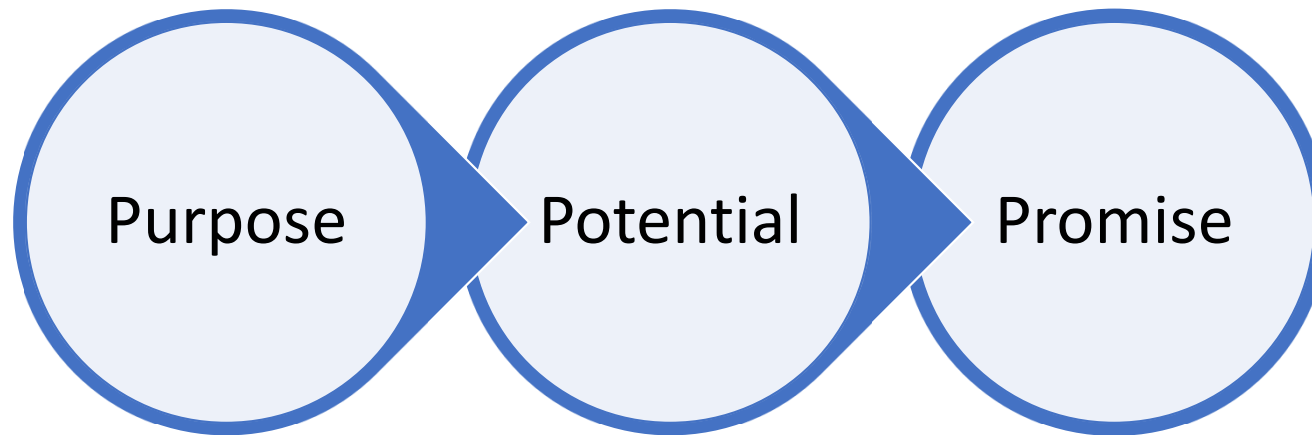
Quiz results:

Branding Strategy Approach

Your Mission



Framework for developing brand



1. Purpose

- Define your Purpose
- Your benefit to the organization
- “What you do, but also the emotional “Why” you do it.
- Speaks to all stakeholders (Employees, Board of Trustee, and Business Partners/Customers)

Example: We strive to empower our workforce to do the right thing, the right way, every day. We envision a BILH culture of integrity, respect, and collaboration – enabled by expert professionals and technology.

Articulating your purpose

- Focus on fluency
- Two activities that can build and improve fluency are below:

		Jeopardy	Pitch
Activities to Build Fluency	Description of Activity	Jeopardy-type game to cover fundamentals of department strategy.	Explain Integrity & Compliance strategy three ways: 1. Elevator pitch - (45 seconds) 2. Cocktail party conversation (2 - 3 minutes) 3. Conference presentation (5 minutes)
	Outcome	Build knowledge of stakeholders, workstreams, program goals, and organizational structure.	Refine your pitch. Connect with your audience. When we can all speak confidently about what we do and why it matters, we promote our work effortlessly and often.

Brand Personalities by Carl Jung-12 types





Poll

What are your top three personality types you feel your department represents?

A. Number one personality trait selected.

B. Number two personality trait selected.

C. Number three personality trait selected.

Brand Personalities by Carl Jung-12 types



3. Promise

Your customers depend on what you Promise.

- Your brand’s promise is different from your purpose, focusing on what you have to offer your customers outside of your specific product or service.
- Before you can promote, you must promise.
- A brand’s promise includes
 - Core Competencies
 - Problems you can solve
 - The “who” you serve
 - Benefits you provide



Example promises

- Achieve and maintain ongoing partnerships with internal customers.
- Always provide open lines of communications, anonymous methods and ability to accept feedback.
- Our team will respond appropriately and in a timely manner.
- We support a culture of transparency and empower our team to be accountable.

Brand in action

Sample projects that influence perception and recognition of program

Hotline Campaign

- Makes promise of responsiveness
- Open lines of communication

Name change

- Reflects vision and purpose
- Defines new program

Code of Conduct

- Sets expectations of customers and department
- Personality and tone of program

Supporting our commitment

Brand Support-Investing in our People

Our core belief is our Brand depends on the professionalism and relationship building of our staff.

We need alignment and strong representation with budgeted support for professional training and certification.

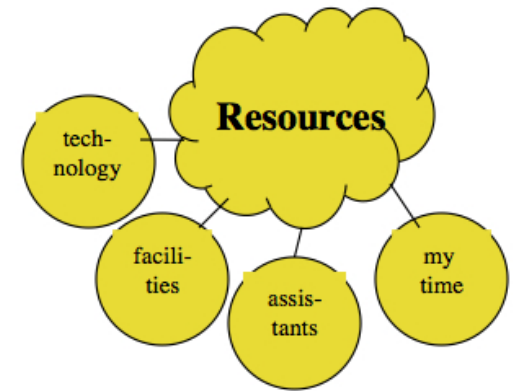
Investment included:

1. Work Style Assessment for all staff.
2. Executive Leadership Trust and Conflict Resolution Exercises
3. All Staff Team Building.
4. Director and Manager Leadership Training.



Brand Support – Commit Resources

Assign your resources properly to support your Promise.



Your purpose of “what” you do and “why” you do it can be operationalized with limited resources, but your Promise has to be resourced properly.

1. Staff for timely responses.
2. Put the right person in key areas to align your program potential.

Monitoring our progress

- Metrics
 - Intake measures and qualities of reporters
 - Outcome-focused
- Cultural indicators
 - Culture of integrity assessment
 - Program effectiveness
 - Consumer recognition of brand and purpose

Measuring brand = measuring effectiveness?

- Many measures of brand effectiveness could inform the maturity and effectiveness of your program
 - Page views** on compliance websites, Code of Conduct, policies
 - Shares and comments** compliance articles and announcements
 - Referral sources to compliance**
 - Search-ability** of department website and key materials
 - Customer surveys and brand / program recognition**

Dealing with Potential Pitfalls



- Attrition/Turnover – build your brand with roles and responsibilities identified, not the person.
- Going too bold -- Over promise and under delivery can ruin your trust and reputation.
- Going too fast – Some program brands need time to restart.
- Disconnect from other business realities or delays – Balance your department tenacity with the global perspective.

Takeaways

- You are branding your program whether you are intentional not
- Establish program identity prior to branding (purpose, promise, etc.)
- Look to traditional marketing tools and approaches to define your brand
- Integrate your brand into your operations
- Measure and evaluate regularly

QUESTIONS

Cara Merski
Deputy Compliance Officer
Beth Israel Lahey Health
Cara.Merski@bilh.org

Kaitlin McCarthy
Associate Deputy Compliance Officer
Beth Israel Lahey Health
Kaitln.mccarthy@bilh.org

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Resources –

- Everything DiSC – everythingdisc.com/catalyst
- The Five Dysfunctions of a Team by Patrick Lencioni
- Dare to Lead by Brene Brown
- First, Break All the Rules by Jim Harter, Marcus Buckingham, Gallup Organization