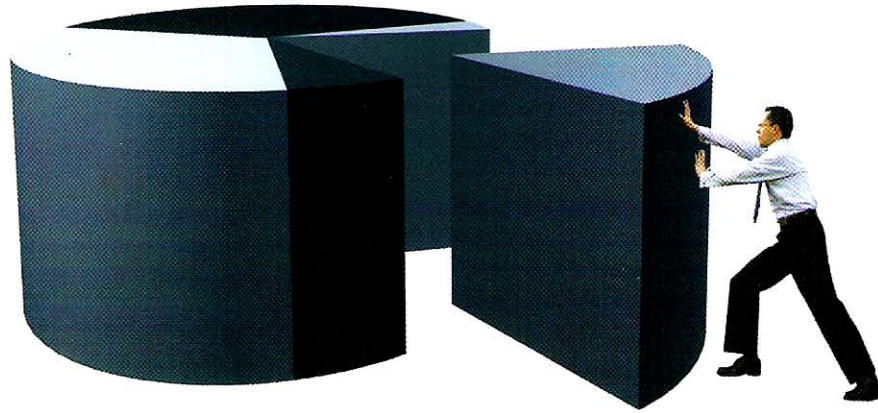


Brand Integrity

as a Management Strategy

By Patricia A. Heffernan



On the surface, Lifetime Care appeared to be in excellent shape in September 2005.

Formed by the merger of Genesee Region Home Care and ViaHealth Home Care, the \$65 million home care and hospice agency based in Rochester, New York, had taken a new name, adopted new mission and vision statements, and reformulated its business strategies to pursue revamped objectives.

All the metrics looked good; admissions were up, utilization and productivity were hitting targets, margins were ahead of budget, and publicly reported patient outcomes exceeded regional, state, and national averages. Below the surface, however, problems lurked. Professional visiting staff, support staff, supervisors, and managers from the formerly separate agencies, were working side-by-side, but not necessarily together.

While the merger clearly made Lifetime Care better in some ways, in many respects we just got bigger. Moving our main office into a new building introduced lots of appealing amenities, but it also spread people farther apart. The new mission statement and brand promise sounded great, but they had not transformed our organizational culture by changing the way we do things.

Fate intervened when a former board member told me about a small consulting firm that might be able to help us. As I investigated the firm called Brand Integrity, one name on its client list got my attention — Wegmans Food Markets, the regional supermarket chain known for service excellence, fierce customer loyalty, and impressive revenue growth.

Ranked at the top of Fortune magazine's 100 Best Companies to Work For, Wegmans invests in their people as the path to great customer service, realizing a remarkably low voluntary turnover rate in the process. Even at the busiest times in its largest stores, shoppers never seem to wait in a checkout line very long. Employees don't tell you where to find a product; they accompany you to the aisle where it is shelved.

For months, I had been telling Lifetime Care employees that I wanted our agency to be recognized as "the Wegmans of home care." And now Wegmans was saying that the Achieving Brand Integrity process helped them keep their people motivated, energized, and focused.

Once key members of Lifetime Care's management team considered and recommended Brand Integrity's approach, we began a brand-building journey that is starting to have as much impact on our performance as our "exception reporting" dashboard of financial measures.

As a person and as a company president, I am guided by the Golden Rule. Like the Wegman family members who run that business, I am convinced that increasing employee satisfaction and loyalty directly contributes to increasing customer satisfaction and loyalty. Best of all, the dollars not spent on recruitment and orientation can instead be used for training, or for improving pay or benefits.

From the beginning, Brand Integrity (BI) principals, Gregg Lederman and Patrick Ahern, showed me the flaws in the traditional marketing model of brand building. They insisted that *companies don't build strong brands by what they say about their products or services, but rather by focusing their time, energy, and resources on "doing the brand" through their people and processes.*

In BI's view, if you see brand building primarily as a promotional exercise, you fail to recognize that every customer experience — and every employee experience — impacts one of three bottom-lines:

1. Productivity increases or decreases;
2. Loyalty increases or decreases; and
3. Sales increase or decrease.

Lots of advertising and marketing firms can create a brand strategy featuring clever messages and attractive visuals. But making your brand strategy operational, so that employees not only buy in but also live and do it every day, is much more

difficult, even with talented consultants. Achieving Brand Integrity is not for the faint-hearted.

Usually, the ABI process starts with internal and external assessments of a company's brand image, accompanied by exercises to achieve senior management consensus on top business objectives. Lifetime Care had already done that work as part of the consolidation of two agencies into one, and BI did not insist that we re-do it while they were on the clock.

Instead, in November they convened a multi-disciplinary work groups, whose task it was to create the strategy for our agency to achieve brand integrity by closing the gaps between what we say Lifetime Care is/does, and what customers believe we are/do based on their experiences with us. To make sure the work group understood that this was not a "marketing" exercise, BI began the first session with a "Dilbert" cartoon, lampooning the idea of a saturation ad campaign, featuring a talking squirrel with a Norwegian accent.

BI usually works with brand teams of about 12 people from six to eight disciplines. At Lifetime Care, I insisted on a brand team of 18 people from more than a dozen different disciplines, including employees from every level of the organization; professional visiting staff, intake and clerical staff, supervisors, managers, and directors. BI agreed that incorporating insights from many perspectives should enhance the organization's ability to achieve buy-in as the strategy is rolled out.

The brand team's first assignment was identifying our most important stakeholders, and determining what they want or expect to achieve through their relationship with Lifetime Care. This process was informed not only by team members' individual experiences, but also by insights drawn from satisfaction surveys, commendation letters, and complaints. Patients want to remain safe and independent at home, of course, but they also want their concerns addressed and their anxiety lessened. Families look for evidence to reinforce their trust in us, not just nurses or therapists who come when they say they will. Physicians and other referral sources look for a willingness to go the extra mile, not just less paperwork.

Once the team completed its review of Desired Outcomes, they proceeded to develop seven Brand Lens concepts that define Lifetime Care internally and externally. Rooted in beliefs and benefits, the Brand Concepts are expressed through Staged Experiences that drive loyalty, productivity, and sales at different stages of customer and employee life cycles.

For example, the team declared that "Superior Service" would mean (among other things), a lower likelihood of hospital re-admission or emergent care use, forming bonds with patients and families and increasing referral sources' confidence.

“Committed to Technology” would enhance patient independence and increase agency efficiency, yielding greater job satisfaction and reducing paperwork.

With the Brand Lens in place, the brand team could generate a catalog of Brand-based Behaviors, actions employees take that create lasting impressions with stakeholder segments. Using a stop-light green-yellow-red model, the Behaviors were divided into three categories: those we should continue to do to bring the brand to life (yellow); those we should stop (red); and new behaviors that we should start (green) in order to strengthen the Lifetime Care brand experience.

The CONTINUE cluster included: Ensuring IT staff can resolve computer problems for field staff in a timely fashion; showing empathy and support during home visits; and investing in professional development.

The off-brand behaviors in the STOP group included: transferring calls blindly; being stingy with resources; and

creating work-arounds to cover up technology problems. The START “green-light specials” ranged from pre-screening prospective employees for on-brand attitudes, holding illness-specific support and wellness activities, to providing more vacation time based on longevity, and collecting co-payments on admission.

These statements may not seem earth-shattering to you; they didn't to me, either. But remember, Lifetime Care's brand strategy in January 2006, was developed by employees, not Top Management. The employees not only defined our brand concepts, they shed light on the behaviors and experiences that would be required to bring those ideas to life from one job category to the next. As they shared their perceptions of the organization and what they thought was important, they created a broad base of belief in the brand strategy, and a willingness to work to implement it.

Through this approach, we would extend responsibility for on-brand performance, not just up and down the hierarchy, but across the entire organization. Our employees demonstrated that they do understand what kind of behavior reinforces customer loyalty, and what kind undermines it. Don't you want a company where every employee owns the brand?



Superior Service
Innovative Programs & Services
Financial Stability Employer of Choice
Committed to Technology
Community Partnership
Passionate Caring

Admittedly, we were also encouraged by results of an Employee Opinion Survey conducted in November. Among other highlights, Lifetime Care achieved best-in-class scores on (1) agreement with the agency's strategy and mission, (2) supervisory support and consideration, and (3) showing an attitude of genuine caring about our patients. These findings reinforced my confidence that Achieving Brand Integrity was a realistic goal.

In mid-March, the BI facilitators propelled us into the Buy-In phase, assembling more than 40 supervisors and managers to introduce the brand strategy. BI reviewed the work of the brand team, describing how the Brand Lens was developed, and explaining what it takes to align beliefs and behaviors to deliver a

consistent Lifetime Care experience. They showed this group the “Dilbert” cartoon

to clarify what Achieving Brand Integrity is

about. They also made it clear that the Brand

Strategy was set and not open for reconsideration,

and that this group should set aside operational issues that might get in the way of

“doing the brand.”

At a second session three weeks later, the supervisory group was given the task of creating and executing a plan for teaching employees the brand, gaining their commitment to live the brand, and preparing them to take action.

Lifetime Care was adopting Brand-Driven Performance Management, the BI facilitators explained, and it was time to engage everyone who supervises front-line staff in setting priorities, for on-brand Staged Experiences that would deliver positive business results.

Once employees at all levels understand what is expected of them — what actions they should and should not take in accordance with the Lifetime Care Experience, they can be held accountable by their colleagues as well as their bosses.

“Staged Experiences are designed to bring the brand to life in effective and memorable ways that empower employees, delight customers, and build greater loyalty among both,” Gregg and

Patrick told the supervisors. They cited examples anyone would recognize: my regular “state of the agency” employee meetings where I keep staff informed about how the company is doing, the weekly 50/50 raffles that raise money for the Employee Hardship Fund, the appreciation events held during Nurses’ Week, and so on.

The brand team had itemized hundreds of Staged Experiences for the supervisors to consider. BI provided the required tool: a Prioritization Matrix, organizing the assessment of Low-Hanging Fruit (Y/N); level of impact on revenue, Brand Power, and Audience Value (high/medium/low); and Resource Criteria for people, time, and financial commitment (low/medium/high).

The group of 40-plus divided into three subgroups, which rotated through sessions with different facilitators overseeing priority-setting for Staged Experiences supporting all seven Brand Concepts. Results from the exercise came to me and the senior management group to be processed through BI’s Ideas into Action framework.

Meanwhile, the BI principals began preparing us for the heavy lifting involved in Translating Strategy into Performance. On May 1, more than 30 clerical and administrative staff received an email invitation to a series of two sessions, to participate in defining “on-brand” behaviors for various in-house support positions, including team medical secretaries, administrative assistants, and other in-house employees most likely to field phone calls from patients, families, or other customers.

They were told that the objective of the Achieving Brand Integrity Performance program is to engage, motivate, and inspire employees throughout Lifetime Care to drive efficient and effective brand strategy execution, and to feel good about doing it. To accomplish this, we must translate the Brand Strategy into actionable line-of-sight behaviors, with employees collaborating to define necessary skills and behaviors that they will demonstrate to ensure delivery of the Lifetime Care Experience.

The result, they were told, would be realistic expectations for success, defined by the people doing the job, and demonstrated by employees positioned to deliver the brand strategy consistently in the way they think, speak, and behave. With greater personal accountability leading to a performance-driven culture, employees and their supervisors could look forward to more consistent performance evaluations based on measurable, objective behaviors.

After the employees’ first session, the BI facilitators recorded a variety of observations. “I have been here a long time, and this is the first time we’ve ever been asked how we feel about how we should be doing our jobs,” one person commented.

“In the past,” said another, “Lifetime Care had provided presenters to come in and talk with us about customer service, but the information they provided was not as actionable and was not

specific enough.” A third declared, “This material about the Lifetime Care Experience Strategy should be part of the hiring process, and taught as part of employee orientation.”

At their second sessions, the front-line office staff identified some sample on-brand behaviors for their group. For “Passionate Caring,” they would: demonstrate patience and listen to the concerns of others; follow up on questions and provide useful information even when it’s outside of “my job”; and demonstrate compassion and empathy when talking with customers.

To deliver “Superior Service,” clerical/administrative staff would: demonstrate a willingness to assist others; ask questions to clearly understand customer needs; following up internally to ensure issues are resolved; and respond quickly to phone calls, email, and other requests.

From this point, it’s not that difficult to envision behavioral performance expectations and job profiles, coupled with evaluation strategies and tools that are themselves Staged Experiences. It’s even easier to see how accountability is becoming vertical as well as horizontal.

Employees are defining what success looks like for their own jobs. Once the behaviors are integrated into the performance evaluation system, staff will be holding one another accountable for doing the company’s strategy. When performance is judged according to the work ethic and standards set by co-workers, it’s the most effective supervision possible.

For better or worse, health care services are delivered in a highly emotional context. Every day, we are dealing with people’s medical crises and vulnerabilities, and with families’ concerns about loved ones. Creating an emotional connection with patients and their family members is critical to the success of any organization that competes in this space.

While the emotional cargo we deal with may be more intense than in other sectors, Lifetime Care recognized that every company in every industry is attempting to do the same thing. We are trying to determine who we are, and then deliver experiences that demonstrate we do what we say.

It is simple enough, but not easily done. Without the Golden Rule, it couldn’t be done.



About the Author: Patricia Heffernan is president of Lifetime Care, a \$70 million home health and hospice agency based in Rochester, New York, with 1,800 employees who take care of 2,200 patients a day. Honored by a local business publication in 2005 as one of 20 business and community leaders designated “Rochester’s Influential Women”, Heffernan applies a management philosophy that her staff can be part of the solution. “Collectively, we have great thoughts, individually we can be tunneled. For every one (1) percent increase in staff satisfaction, patient satisfaction is affected by two (2) percent,” she says. Pat can be reached at patricia.heffernan@lifetimedcare.org.