5 Easy Steps to Improve Your Internal, Cross-Organizational, and Client Relationships

Introduction

No matter what you do in the world of health care, you have important client relationships with other organizations: internal customers, external customers, payers, providers, patients, suppliers, and partners. When those relationships stagnate or go off-track, improving them is difficult. Anecdotes, innuendo, and opinion about performance typically become the key points of discussion and getting to the root-cause facts can be challenging.

Health care professionals are buried in data that measure and track how cross-organizational relationships and processes are functioning. There's probably a trail of data that documents what occurred between your organization and your clients. Unfortunately, using that data to describe and help diagnose events is uncommon and underutilized.

There are organizations and people who have found ways to use facts and data with their clients — internal and external — to take the anecdotes, opinion, and innuendo out of their relationships and find out what's really happening.

By uncovering and examining issues in a non-judgmental, fact-based way, you can get everyone focused on facts. With facts as your foundation, you can solve the issues, find mutual improvement opportunities, and build trust and cooperation. This paper will outline 5 easy steps to conducting a successful client-shared data analysis.

Step 1: Do your homework

First things first. When you get wind of an issue or problem with a client, determine if the situation is appropriate for an analytics approach. Start by asking yourself:

- **Is the problem that needs addressing a performance-based issue that you can measure and track?** If the client is complaining about late diagnostic test pick-ups or too many rejected claims, then you can probably proceed. But if the client is complaining that he or she doesn't like the attitude of their assigned manager, data to illuminate this issue may not exist.
- **Do you have access to the data to support your measurement and tracking?** The client is complaining about late diagnostic test pick-ups — do you actually have access to the data to analyze? If you do, is the data in a format that you understand and can analyze? Data can always be acquired and cleansed to meet your needs, but make sure you understand the effort before you commit. If necessary, get some preliminary data and investigate. Are you going to find what you're looking for? And if you do, is there anything you can do about it? Take for example, a firm that is able to identify the contributing elements to an issue, but can't do anything about altering them. The analytics are interesting, but because the root cause cannot be changed, the relationship can not be salvaged.

When client relationships stagnate or go off-track, improving them is difficult. Anecdotes, innuendo and opinion about performance become the key points of discussion; getting to the root-cause facts can be challenging.

- **Is the situation appropriate for data analytics?** Sometimes the time has passed for taking a fact-based look at a mutual problem. Data analytics that come too late can look like you're trying to blame other parties for a problem that should have been addressed earlier.
- **Do you have the people, time, and tools necessary to do the analysis?** This is probably the most important part of your homework. If you do not have the people who can conduct a solid analysis, you risk making errors and misrepresenting facts. If you don't have the time or tools to do a good analysis, you risk overlooking key factors in the situation and drawing bad conclusions. Ideally, the tool you choose should be easy to use so that nearly anyone can run it, connect directly to multiple data sources without requiring data transformation, answer many different kinds of questions quickly, and produce results that are visually easy to understand.

Step 2: Agree to take a fact-based look at the business process

Now that you have identified the right situation with appropriate data and a client who will likely be supportive of your suggestion to look at the data, it's time to draw up a plan for your analysis.

- **Approach your client and get their buy-in. Had the client been asking for data analysis?** Great. If your client is data-oriented, that's a bonus for you. But even if they are not, there are still opportunities to take a fact-based look at the situation. It's likely your client is open to analyzing data together. Agree not only on the basic analysis needed but the scope and timing. The last thing you want to do is have your client think you're delivering one thing and then delivering something less.
- **Define the metrics and analytics that you'll be looking at.** It's important to know what questions you're asking so that when you deliver answers, they are the answers your client wants to see. Make sure you have the data to support those metrics. A good piece of advice is to keep it simple, especially to start.
- **Can you add analytics that help your client in their day-to-day business operations?** In today's world, everyone is becoming more metric oriented. So in addition to defining metrics that concern the situation, find out if there are peripheral questions you can answer that would help your client. If you deliver analysis that helps your client address their issues, you quickly become a hero. Take for example, a situation where a company is analyzing the performance of their product for a client. But in addition to helping their client understand their product's performance, they were also able to create benchmark data over time for one of the client's related business process. The client really appreciated the additional analysis that they had wanted to do but could not due to lack of resources.

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- **Be careful not to over commit.** As interesting as their exercise may be and as much as you may need to turn-around a difficult situation, be careful not to over commit as to what you can do. Analytics can be time-consuming. In addition, you may find your client wanting to repeat the analysis regularly so keep the project in scope.

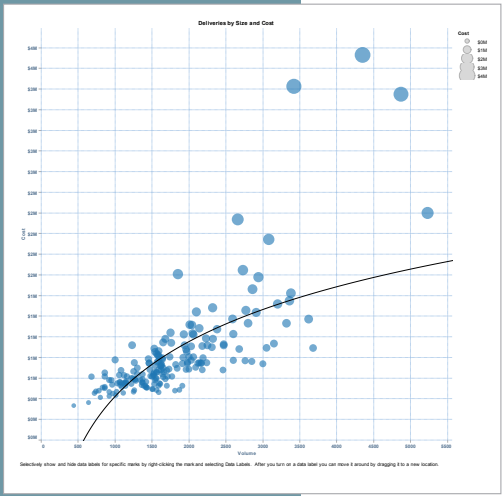
Step 3: Conduct your analysis

It's time to actually start conducting your analysis. You've done your homework in terms of making sure you've got the data and you've worked with your client to ensure you're asking the right questions.

Key factors to manage include:

- **Ask the basic questions first.** Don't start out by trying to get every question answered with one analytical query. Ask the basic questions first. How many orders were delayed? What kinds of products were most likely to be delayed? Get to know the data and tease out the core patterns and relationships.
- **Layer in additional elements.** By layering your analysis with increasingly detailed and sophisticated questions, you will have a better understanding of the issue. How many orders were delayed in each market? By month? By product line? By shipping facility? By month by shipping facility? Gaining more detailed insight is important because when you have to explain the situation to your client, you'll be able to do more than just present the answer to the question. You'll be able to explain how you arrived at that answer and why it supports any corrective actions you're recommending.
- **Use visual graphics to help you see more data more rapidly.** Simple cross-tabs can give you details but use data visualization (e.g., bar charts, line graphs, maps, scatterplots) to iteratively filter and drill-down and through your data. By using visual analysis during your data investigation, you'll be able to examine five to ten times as much data and therefore uncover the hidden gems much more easily. You'll see patterns and relationships in your data emerge.

  An example would be someone at a company analyzing customer balances by detailed segment for another department. When faced with a sea of numbers and no visible patterns, they turned the data into a bar chart where quantity was the height of the bar and balance was indicated by the color of the bars. Instantly, one bar turned deep red and everything else was dark green. They knew from the dramatic color difference that the deep red segment was the problem. Without visual analytics, it would have taken much longer to discover the problem segment.



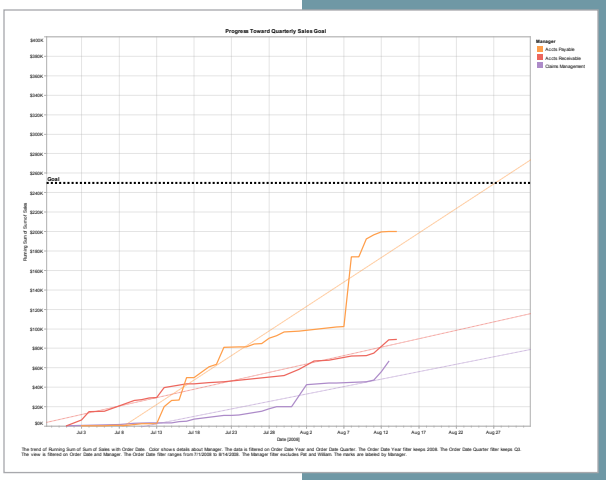
Conducting analysis with clients means clearly identifying outliers—data points that fall outside the expected pattern.

- **Eliminate the views and analysis that are interesting but not necessarily relevant.** Sometimes in your analytical course, you find a stray fact that is interesting but not important to your client. Make a note of it for your own future use but eliminate it from your analysis. You are trying to help your client understand a specific situation and straying away from that will only confuse your client and prolong the situation. Again, focus and simplicity are the keys.

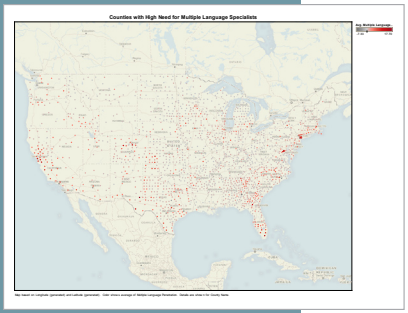
Step 4: Present analysis and prepare for discussion

Now it's time to take your analysis to your client.

- **Consider sharing "preliminary results" with your client.** If you're not sure how your analysis will be received by your client, you may want to share some basic preliminary results. Assuming your client is open to the idea that "preliminary" results are not final, you can get a good idea early on if you're on the right track. You can also use this idea to share results earlier with a sympathetic person on the client side to get an idea of how the analysis might be received by others who may be more hostile.
- **Keep your presentation of results simple and clear.** Above all, you want to be very clear about what you discovered and the likely implications. This is not a time to drill-down into deep details. This is a time to keep it as high-level as the data and situation will support. Using visuals will make the story easier to see and understand.
- **Stick to the facts that matter.** Recall that this is likely a situation where improvement is needed and that someone is unhappy because they are not getting what they need for optimal business performance. So keep your focus on the issues that matter: things that are costing money, lowering ROI, deflating revenues, or wasting time and resources. Use non-judgmental words — words that are about the data (not about the blame).
- **Be prepared to discuss details — particularly details about their business.** Everyone loves to talk about themselves. You've got your client listening to an analysis that is at least in part about them. Be prepared to discuss details that pertain especially to their business.
- **Share copies of your analysis if possible.** Being open about your data analysis will serve you well. Ideally, you can leave a copy of your presentation behind, whether that's an electronic version or shared via the web.



Create graphics that make it easy to see developing patterns and issues. Ideally, identify the variance from the expected values so you have a way to evaluate under- or over-performance.



Don't be afraid to use multiple kinds of visualizations and graphics to tell the story. Here a map clearly identifies geographic patterns.

Step 5: Determine how to move forward — and do it

So you've presented your findings in a clear and articulate way. Now what?

- **Propose clear and rational recommendations about what the data mean and what can be done to improve the situation.** You're doing this to help you and your client determine what can be done about a mutually troubling situation. Make some recommendations for next steps. Don't make the easy mistake of presenting analytical results without summarizing the key points, drawing out proposed conclusions, or making recommendations to improve the situation.
- **Use your analysis to facilitate discussion about how to improve the situation on both sides.** You may know what you need to do but there are probably things your client can do to help. So use your data analysis to help support your request for changes on both sides.
- **Make commitments to follow-up — and keep them.** You're almost to the goal line but you can't cross it until you see improvement in the situation that got you here. One need may be to continue monitoring and analyzing data on an ongoing basis. Ideally, you would be using an analytical tool that facilitates automatic updates from live data.

Conclusion

By using data to uncover and examine issues in a non-judgmental, fact-based way, you can get everyone focused on facts. With facts as your foundation, you can solve the issues, find mutual improvement opportunities and build trust and cooperation.

Analyzing data with clients is not as much a matter of creating complex and lengthy research reports as it is a way of approaching a client issue with a fact-driven approach. We hope this 5-step prescription is a good starting point for how to get started improving your client relationships.

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About Tableau Software

Tableau Software, a privately held company in Seattle WA, builds software that delivers fast analytics and visualization to everyday business people. Our mission is simple: help people see and understand data. Tableau's easy-to-install products integrate data exploration and visualization to make analytics fast, easy and fun. They include Tableau Desktop, web-based Tableau Server and the no-charge Tableau Reader. Tableau has already attracted over 10,000 licensed users in companies from one-person businesses to the world's largest organizations. For more information on Tableau Software, please visit **www.tableausoftware.com**, email **info@tableausoftware.com** or call **206 633 3400 ext. 1**.

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