

## **21 Points for a Successful Inno-Visit**

1. ***Why It's Important*** – Site visits are the most efficient, quickest and effective way to increase the learning curve about Innovation. You are learning from those who have been there, often with decades of experience, insights and learning. It is a very effective way to use scarce time and resources for busy leaders, Board members and physicians. Finally, site visits are extremely energizing and rapidly builds support for the new way with key leaders.
2. ***3 Common Barriers*** – Big egos from senior management are the biggest barriers to even considering personally going on an exploration site visit. Having the courage to admit that you don't know much about Innovation and then going personally (as opposed to delegating someone) is the necessary first step in changing your culture to one that supports creativity and new ideas. The second barrier is the fear of looking stupid or expressing to be naïve on a new field of management. Going out on an exploration to an unknown territory of the business world can appear to be scary but nearly everyone started their journeys in this same way. Finally, a lack of knowledge on how to set up the site visit, how to conduct an effective session, and capturing the learnings can appear to be a large unknown. These 21 points will provide enough to get started and your enthusiasm for the adventure is all that's also needed.
3. ***Why the Host Company Welcomes You*** – First of all, your visit will be welcomed by the senior leadership, especially if you are an existing or potential customer for them. Aren't you proud to give tours of your hospital and answer questions about how you got to be so successful? As a not-

for-profit hospital or health system you are not a competitor, and in fact, your charitable mission and vision are a source of envy for your host. Finally, the host will be flattered that you think they are innovative, that they are being benchmarked against, and that they can help change another industry (that really needs it). Besides, the visit might lead to some new business and strengthen their existing and future relationships.

4. ***Developing the Prospect List*** – Start with your existing large suppliers and vendors who are recognized leaders with a regular flow of new products and services and an established track record in innovation. Local companies that have R & D budgets also help you sort out new terms and definitions and are easier to schedule and travel. You will probably need to sit down with your purchasing department and get an idea of your purchasing volumes with major suppliers which will be a necessary thing to know for the site visit.
5. ***Stay Away From Sales*** – Probably the hardest job will be to identify the right person to make a contact that can steer you to the R & D or product development leaders. Aim too high and you will not find a sympathetic ear or have problems with tight schedules. Aim too low and you may not be talking to people who actually know the innovation process and the history of its evolution. Above all, stay away from a pure sales staff, as you will only be viewed as a potential customer and you will only receive a very long, elaborate sales presentation.
6. ***Doing Your Homework*** – Research your site visit company very thoroughly. Know how much you are buying from them or one of their competitors. Carefully review their web site,

last 2-3 annual reports, top executives, WSJ articles and do a good web search. Take along or send in advance a brief description of your organization and it's top leadership.

7. ***Making our Initial Contact*** – Always assign a senior leader to make your initial contact and be very clear who you would like to meet with by title or function (the head of R & D, the person responsible for new product development). Never delegate this responsibility to an assistant and you might have to use others to make an introduction or to make an initial contact. Always ask at the host company who they think is doing great innovative work and could they open some doors or make some contacts for you. Network, network, network!!
8. ***Explaining Your Purpose*** – Outline why you are interested in Innovation and why their company was chosen. Be firm that you are just learning and would like to bring a small team of senior leaders. Ask for about 2 hours with their leadership, but almost all of our visits ran much longer as the passion and enthusiasm began to flow.
9. ***Who Goes on the Visit*** – The small group of leaders who are very passionate and enthusiastic should lead the small team. Always take along an enthusiastic Board member and maybe someone new each time from senior management. An ideal size is 5-6 persons, but any size as long as it's not too large can capture the learning and build future relationships. Think of these visits as repeatable and always be on the lookout for speakers and presenters for your management education days and Board retreats.
10. ***Make a List of Questions*** – Always draw up an extensive list of questions beforehand and share with everyone. At first the questions will be very general, but after a few site

visits you being to ask better questions and have a knowledge to compare and contrast from. Ask further clarifying questions on any terms or concept you don't understand. Remember, you are the sponges and really understanding what the presenter is saying will be key.

11. **Sample Questions** – Start out by asking who is responsible for new product/service development, what background/training they have, where they go for professional development and meetings and what literature they read and/or publish in. Ask what process they use for generating new ideas, where the process came from, who is directly involved in new idea formation, how deep in the organization do they go to find new ideas. What are the budget thresholds for new ideas, prototypes or new businesses and who has to approve what at what level. Finally, ask what are the major obstacles, barriers, and roadblocks that keep them awake at night, that get in the way of the innovation process. Also ask if they had it to do over again, what would they do differently and what are the lessons learned by the many failures and unsuccessful ventures.
12. **Your Objectives** – Almost every site visit began with a request by the host for us to clearly set out our hospital's objectives in the journey of Innovation. What did we want Innovation to do for our customers and for our organization was right at the forefront of getting started. Be clear as to what your initial objectives are and be prepared to adapt and modify them as your knowledge increases.
13. **Non Disclosures** – Some organization may want you to sign a non-disclosure form before they will start the meeting. This protects their intellectual property rights and is a very

wise thing to do for all parties. The host takes the protection of this intangible asset very seriously and you should also. You probably will not be able to modify the agreement at all, but you can limit it's duration for a year to two.

14. ***Sponges, Learning, Listening*** – One of the reasons for having a small group of learners is that often each person has a different perspective on what they heard or often team members miss what is being presented because they are sorting out something or are taking notes or in a side conversation. Try to clarify all aspects of what is presented and always ask what other options or choices were considered every step of the way. Ask if you can get some answers to follow-up questions after you have a few days to digest what you learned and everyone has had a chance to debrief. This helps with a second visit or important follow-up opportunities and partnerships.
15. ***Returning the Favor*** – At first the site visits will be fairly one way learning, but after a few experiences you may be able to help your host with some new information, new articles or a web site that you came upon. This makes the visit a real win-win for all parties and helps develop your personal network.
16. ***Opportunities to Partner*** – Always keep your antenna up for future opportunities to test bed new products and services, serve as a beta site for a new prototype or jointly develop a new product. Many organizations are looking for innovative hospitals to gain access to clinical staff or need a clinical group to evaluate future needs. Being able to spot a good opportunity is a very valuable skill and should be evaluated at the end of every site visit.

17. **Write Up Learnings Immediately** – On the way home or very shortly thereafter, commit yourself to a formal debriefing with as many as possible. Write down all your observations, lessons learned, steps on the Innovation process, key people you met and their phone numbers and e-mail, and points for further clarification. Circulate your learnings to your senior leadership and enthusiastically review the key points with all those who are interested.
18. **Follow-up With Thank Yous** – Always follow-up immediately with a personal thank You note (never e-mail) to those who shared their experiences. Be sure to let them know how much you learned and how valuable the site visit was to your future planning. Let them know if there are any other follow-up items from you and be sure to honor your commitments.
19. **Small Gifts** – Either when you finish the site visit or as a thank you soon after, it is great to give each presenter a small gift from your organization. The more innovative and clever, the better, so someone should be assigned to come up with just the right gift. Real home run visits should include a great gift basket to express your thanks for sharing so much of their learning.
20. **Identifying Contact Persons** – Always assign one person to be your organizational chief contact person for follow-up and to really work on the ongoing relationship. Remember to keep your host involved in all your successes (and good failures) and to return any favors from your organization. Watch the business news to follow your hosts new products and their business successes.
21. **Help with Leads and Introductions** – Always keep in mind opportunities to supply your host company with important

leads for new business. Often you will know about a new building project or a new physician group that you can make an introduction and help establish a good contact. As your partnerships and networks grow you will become an important organization to many all because you first started out as a naïve, newcomer to the field of Innovation who just pick up the phone and began the exploration.