



VENDOR RELATIONS

Client-partner Relationships: 3 Tips for Success on Both Sides

Given the complexity of modern health care, deep relationships between in-house departments and outside partners are commonplace. Yet, getting the most out of these partnerships can be difficult. In this article, we learn about best practices through the eyes of a health care marketer within a provider organization, as well as a digital marketer from an outside firm that works closely with hospitals and health systems.

Alan Shoebridge, Director of Marketing at Salinas Valley Memorial Healthcare System

When I started my new job, I had to assess numerous existing and prospective vendor/agency/partner relationships at once. During that initial process and the months that followed, I gained some perspective on what success looks like – it comes down to consistency, communication and collaboration.

Jeff Steblea, Director of Sales at Eruptr

Those three factors are vital. Both sides have to be on the same page regarding what work has been done, or needs to be accomplished, and what the future vision looks like. In addition, trust and mutual respect build positive relationships.

Consistency

AS: I have noticed regular turnover on the staff of our outside partners with sometimes several new representatives being introduced in a year. You lose a lot of momentum when things are constantly in flux. Whatever partners can do to minimize turnover or at least make transitions more fluid, would ensure stronger relationships.

JS: This is vital from my perspective too, as I see it happen at provider organizations as well. When a provider organization has a team in place for a long time, it functions at a high level. Staff turnover can have a negative impact, especially on timelines. When a provider team changes, I like being able to share reports and ideally put together a presentation to acquaint new team members with what we've achieved as well as our vision, our goals and how we're measuring success.



AS: Part of the consistency issue is setting realistic expectations and delivering on them. I have always worked by the maxim “under promise and over deliver.” Promising unrealistic timelines, product deliveries or budget estimates to clients can only lead to frustration. Now, if you can over promise and over deliver, that's wonderful.

JS: I agree. Good outside partners set realistic expectations and educate the provider team on their areas of expertise. Hospitals and health systems turn to outside partners for expertise in a specific area, so they need to fulfill that role. Sometimes there are unforeseen factors that affect budgets and timelines, but if you have credibility and can clearly communicate why changes are happening, the partnership will endure.

Communication

AS: Communication is the key to success in so many aspects of our personal and professional lives, especially in times like these when we're dealing with a crisis like COVID-19. Regular touch-base meetings between partners are critical to avoiding miscommunication on project deadlines, budget status and other issues. Project check-ins held weekly or monthly are vital, and comprehensive partner business reviews should be held yearly or quarterly depending on the scope of the work. During a crisis like the current one, the best type of communication is one that will help me and my organization with our immediate needs.

JS: Communication is key, and I have yet to see any two provider organizations that have the same needs, which presents a challenge. Some prefer regular communication, while others have to be convinced of that value. A good strategy is deciding on the schedule of communication early, and then reviewing how that is working. While much can be accomplished virtually, an annual face-to-face strategy session is invaluable and requires everyone's full attention. During sensitive events like the current coronavirus pandemic, the strength of a relationship can really be tested. What is the correct frequency of communication? What types of communications are appropriate? It's a tightrope walk.

AS: Building on that, health care organizations also owe outside partners honest feedback in a timely manner. If you're unhappy with the product or service, say so. Waiting until the contract expires to surface unhappiness ensures little opportunity for course correction. Even if a relationship doesn't ultimately work out, at least the decision to terminate won't come as a surprise and you have given them a chance to improve and keep your business.

JS: Outside partners want to hear feedback, good and bad. Again, all organizations have unique preferences. I truly value those who can clearly tell me what they need and how we can improve. Straight talk also re-energizes both teams when it's done respectfully.

Collaboration

AS: I want outside partners that will push my team to develop excellent strategies and deliverables. One way to do this is by offering suggestions on best practices and enhancements. We don't expect you to share anything confidential, but if one of your clients is trying something interesting, let's talk about it.

JS: I agree, and this can be complicated. An external partner has to balance offering the best solutions possible with the reality of resources and priorities for internal teams. As we've seen over the past few months during the pandemic, health care does have the ability to innovate quickly when needed. It's all about sensitivity and timing — knowing when to push for something but ensuring you're not pushing too far, too fast.

AS: It sounds simple, but provider organizations need to provide business goals and clear direction. If you can't articulate what you are trying to accomplish, there is very little chance that your outside partners will be able to deliver something of value. It's completely fair for them to ask you who your target audience is, what actions you want them to take and how you'll measure success.

JS: Clear objectives are necessary, and sometimes it takes time to establish goals. Outside partners not only execute strategy these days, but often help set it. Within provider organizations, leadership may be hearing a lot about tactics and tools, so the internal team is tasked with finding out more. For example, "we need a CRM" or "do more social." A good strategy partner should ask "why?" Depending on the goal, maybe these aren't the appropriate tools or tactics, or maybe they are, but they need to be evaluated appropriately.

How Leaders Can Support a Great Partnership

It's easy to get excited about new work for your health system or hospital. Here are three ways leaders can help support new partnerships:

Consistency: Provide clear guidance and assign people on your team who have the adequate time, knowledge and expertise to make working with a new partner a success.

Communication: Make time to connect on a regular basis a priority for you and your team. For critical long-term work, schedule quarterly phone calls and an annual in-person meeting.

Collaborate: Share your business goals and be honest about organizational challenges. If you don't know what you're trying to accomplish or why, take more time before committing to bringing on a new partner.

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