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AI Practitioner

Sales/Finance & Appreciative Inquiry: Positive Images, Positive Action, Positive Results

Guest Editor: **Ralph Weickel, Performance Management**
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Creating Strategy for Engaging with Key Opinion Leaders in a Market

ABSTRACT

A medical devices company wanted to move beyond good results and a promising future to achieve more sustainable growth. Engaging Key Opinion Leaders was key and Appreciative Inquiry was used to uncover important knowledge about Key Opinion Leaders and their influence in the market.

This story began with a phone call from a client.

Using Appreciative Inquiry, we had already worked together a few years before on a sales-related project. My client remembered the AI approach I had used, which was very 'different' at the time and made a big impact on her business.

A year ago, she took the role as head of a business unit within a leading global medical devices company. She spent the first year getting to know the business, meeting customers and users, and reorganising her team.

Who are the Key Opinion Leaders?

The fruits of her efforts followed: the business showed good results and a more promising future. However, my client knew that in order to achieve sustainable business growth, a key component was missing. She wanted success to be less dependent on the efforts of specific sales reps or one-off marketing initiatives, and more on the reputation and trust in the brand. She wanted a well-executed strategy of engagement with the key opinion leaders (KOLs): they affect future trends in the market, how buying decisions are made, and influence which therapies and technologies are likely to be pursued. Experience shows that buying decisions and recommendations of KOLs have a strong impact in the market.

In her market, KOLs included leading surgeons, clinicians, academics and commercial stakeholders, as well as members of relevant professional committees and groups. We realised also it was important to pay attention to those showing potential to become KOLs even though they might not yet be there – the up-and-coming KOLs.

We could use Facebook profiles to capture the known information and links between KOLs.

To increase the success of the business, my client needed to ask and be able to answer four key questions:

- Who are the most relevant KOLs in her business market?
- What are their needs?
- How could her business meet these needs?
- What strategy for long term engagement with them would be useful?

She wanted this strategy to lead to planning the next steps toward building relationships with each of the prioritised KOLs. The client wanted to begin by focussing on the clinical KOLs.

To summarise, the purpose of the project was to:

- Significantly raise the awareness of the relevant clinical KOLs in the market
- Develop a specific strategy to take existing relationships with KOLs to the next level
- Identify and develop relationships with further KOLs

Discovering, Dreaming and co-Designing the intervention with the client

The first meeting with my client included the business leader and her marketing manager. I started by asking for examples of good relationships they already had with KOLs.

We shared a few stories, which enabled us to identify the key themes of success. I then asked 'What do we already know about the KOLs in the market?' and 'What else is important for us to learn?' Both questions generated useful material for the design. For example, one of the responses was that the KOLs are a social network of professionals influencing each other and a wider circle of contacts. In some cases we did know who influences whom; in other cases, this was uncertain. It was also felt there were people in the company (outside the business unit) who could further inform us about other KOLs.

Adapting the Facebook profile to capture KOL information

At this point, I was inspired to suggest an innovative idea for the design. By thinking about the KOLs as members of a social network, we could use something similar to Facebook profiles to capture the known information and links between KOLs. To start with, we could use a paper template to capture the knowledge we already have. We could then invite everyone in the team to add what they knew to each of the profiles. My client welcomed the idea enthusiastically. We envisioned our meeting room full of these 'profiles'. I also suggested dedicating some time for online research about the different KOLs (using readily available information). As my client wanted to create ongoing strategy, we decided to add a second day for an AI planning process.

My client and her marketing manager had planned to invite their management team of six members. I encouraged them to invite others in the company who knew the KOLs we were interested in and who could possibly influence the plan we wish to create. A total of seventeen participants were invited, fifteen of

It was truly impressive to see the knowledge that was already in the system.

whom were able to join us on the day. They came from other departments in the business unit, the European HQs and sister companies with contacts to the same KOLs.

Over the next few months, I worked closely with my client and her marketing manager to secure the required budget, design the workshop, create an AI questionnaire, design a template, create a list of target KOLs upon which to focus and complete all the required logistics. The template itself had a few strengths-based questions to prompt participants to bring up the best of what they knew about each KOL.

The excitement about this project stayed alive despite a few recession-based setbacks (e.g. a travel-freeze was put in place which forced us to reschedule). We all felt inspired that this innovative design would help the business move towards its goals and, most importantly in this difficult business climate, inject positive energy.

Delivering the workshop

In February, 2012, after an opening by my client, introductions and an ice breaker, we started the main activity – completing templates based on what the participants already knew about each KOL. We had more than 150 profiles which we divided between the participants. When one participant completed a profile, he/she passed it around to others so that they could add more details (many of the participants had interacted with different KOLs over the years).

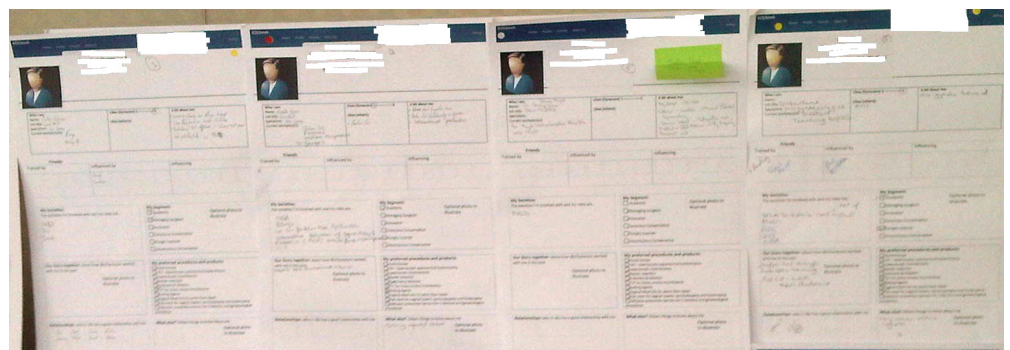
In the afternoon, we asked the participants to research online and add information readily available in the public domain. Many participants were surprised by the amount of relevant information they were able to easily find – mostly from websites of the KOLs themselves. This activity was full of energy and participants made comments such as: 'I didn't know John Smith is involved with project X' or 'I just found out that Ms. Jane Doe is a member of society Y'.

As time progressed, the room's walls and windows were covered with completed profiles created by the team, just as hoped at our planning stage. It was truly impressive to see the knowledge that was already in the system laid out in front of us!

Defining and imagining good relationship with KOLs

At the end of the first day, I asked the participants to walk around the room and prioritise, with sticky dots, the KOLs they felt we should target (based on the profiles). The exercise proved challenging. The participants struggled to

KOL profiles created by the team



In half an hour, the group had a clear, shared definition they could work with.

prioritise. Upon discussion, it quickly emerged that we did not have an agreed definition of who was truly a relevant KOL. There was confusion as to whether we should include several big users of the products, practitioners we 'liked', or leading medical practitioners not specifically relevant to the future of the business. A conversation started around how to prioritise, but unfortunately we had no time to reach conclusions. Further reflection with my client at the end of the day highlighted the importance of reaching an agreed definition of who is or isn't a priority KOL.

Overnight, as I was thinking of the adjustments required for the next day's programme, I was concerned the group might require a long time to discuss and agree upon a definition. It came to me that we could use the OPERA¹ process for dialogue and decision making, which I had been introduced to a few years earlier by Linda Mitchell, a colleague from the UK AI network. I decided to try it with the group.

We started the second day with a round of reflections. Many of the participants shared how much they enjoyed the first day as well as their need to reach an agreed definition. I then introduced the group to the OPERA process which worked like magic! In half an hour, the group had a clear, shared definition they could work with.

For the rest of the morning we used a paired-interview process, the topics being 'developing good relationships' and 'successfully influencing someone else's opinions'. They were asked to imagine and dream the best possible future. It was great fun and so releasing. One group presented a skit of a cooking show entitled 'How to cook a friendly KOL' (the recipe included all the 'ingredients' and 'cooking instructions'). Another group presented a vision where the business was already great at influencing the clinical KOLs, so much so that they were invited to 10 Downing Street to engage with other global KOLs.

Simultaneity in action – from compelling image to detailed steps

In the afternoon, the team worked on an overall strategy based on their dreams using the ABC process (often referred to as the 'Goose Egg').² I invited the participants to start developing some of their ideas in more detail. Small groups formed quickly and started working.

While this was happening, a few participants approached me with the request: 'Could we go back to prioritising the KOLs where we got stuck last night? We think we got clearer ideas now'. After a quick coffee break, I raised this question with the whole group. There was a lot of enthusiasm so I told them to go ahead.

It was a great example of simultaneity in action! The Deliver/Destiny phase started unfolding in front of me ... within 30 minutes, the whole group, working together, went through all the profiles and made very quick decisions about each KOL – what impressed me was seeing the whole team working together in complete alignment and making very quick, shared decisions.

1 OPERA is a quick dialogue and decision making process. The letters stand for Own Reflection, Pairs, Explore, Rank and Arrange. More details here: <http://www.innotiimi.fi>

2 The ABC/'Goose Egg' process was developed by Jane Magruder Watkins and David Cooperrider.

The final part of the day was a closing circle of appreciations. Participants left the workshop excited about their next steps and the future ahead. In addition, I was asked to come back to run a similar exercise with other parts of the business.

Reflections

With the group, and later debriefing with my client, we looked at what worked particularly well and what would make a future exercise even better. The key themes of success were:

1. The foundations for the workshop design were based on a strengths-based approach and the AI process (What do we already know that is useful? What is already available? What great experiences from the past could help us move forward?)
2. Unleashing the creativity through the Dream process – the group members amazed themselves in how creative and energising their visions and presentations were
3. The freshness and familiarity of the Facebook concept
4. The OPERA decision-making process that quickly led to a shared definition

We felt we could have enhanced the experience by running the workshop offsite, away from the office atmosphere and normal distractions of the office, as had originally been envisaged, but unfortunately had not been possible due to budget restrictions. Also, we could have used the OPERA process earlier.

The two days were intense with a lot of energy from the participants who, by the end, were exhausted. There should have been more emphasis on true and longer breaks – rather than allowing people to work through the lunch and coffee breaks.

Finally, there was a strong desire to explore up-and-coming KOLs not as yet fully covered, using newly-discovered inquiry talents and a similar process. I, of course, would be excited to help take the group further.