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Using business tools to enhance your team's success

Ray Gerwitz, MBA, CHPA, CPP

Security leaders would do themselves a favor by adapting a few business tools for strategic planning and assessment of success. In particular, three visualization tools—strategic mapping, storyboarding, and data visualization—can help to optimize performance, control costs, enhance team members' enthusiasm, and increase upper management's trust in the department.

(Ray Gerwitz, MBA, CHPA, CPP, is Executive Director and Deputy Chief Security Officer for the University of Texas MD Anderson Cancer Center, in Houston, and the University of Texas Health Science Center at Houston. He is a member of IAHS.)

We now live in a dynamic risk landscape, where intentional and unintentional actors leverage technology and other tools to exploit an array of once unimaginable vulnerabilities. Combined with the shrinking tempo of traditional planning cycles, this reality means that healthcare security teams must be more agile and adaptable than ever before. As resources are directed away from physical security efforts and from workplace violence programs to increase organizational efforts to remediate growing cyber concerns, leaders must work harder than ever to maximize assigned resources on behalf of prevention and diminishing organizational harm.

Today's healthcare security teams must adapt to new threats while also managing traditional crimes against persons and property. This new norm for operational and strategic responsibility has left many security lead-

ers looking for an improved approach to planning and execution. As we look to shift protection strategies and adjust our thinking, we are well served by first looking to our organizational partners and business leaders. After all, we are not alone in this pursuit of agility and adaptability. Our clinical, research, and administrative partners face similar challenges in their profession, and it is from them that we may learn the most.

Many readers have likely been exposed to the language of the C-suite and to presentations arguing that learning business terminology can help you gain credibility with executives. This is where security leaders have an opportunity to adopt a different way of thinking. Security leaders must now look beyond language and gain an understanding of how business tools and practices may be adapted to enhance the credibility and capabilities of security programs of all types and sizes.

The remainder of this article will focus on how a few rather simple business tools and practices that, when reimaged, can drive strategic and sustainable success for a healthcare securi-

ty team. These tools feature visual ways of clarifying (for yourself, your staff, and organizational leaders) what your overarching goals are, how these goals support the larger mission of your organization, the best ways to reach those goals, and the evidence that supports your plans and actions.

A MAP FOR SERVICE EXCELLENCE

Most interesting journeys begin and end with a map. Maps have been used throughout time to plan a path from Point A to Point B, with the desired goal being a successful journey. Since the early 1990s, organizations (although very few in healthcare security) have been using strategy maps to describe their business goals. In a single page, a strategy map lays out your overarching objectives. Robert S. Kaplan and David S. Norton, authors of the book *Strategy Maps: Converting Intangible Assets into Tangible Outcomes*, describe strategy maps as a tool any organization can follow to best align processes, people, and technology for superior performance. As they note, a strategy map provides the missing link

between strategy formulation and strategy execution [1].

When crafting strategic-planning documents, healthcare security leaders interested in expanding their adoption and adaptation of proven business practices may want to consider developing a strategy map. By adding such a map to existing, and often required, planning documents, leaders can simplify the messaging relating to how their teams operate and how they add value to the communities they protect. A strategy map also serves as an engagement tool that helps healthcare security leaders more readily demonstrate their teams' strategic alignment with, and value to, internal and external partners.

The strategy map shown in Figure 1 was developed by the University of Texas healthcare security team to define an operational framework for service excellence. It was meant to aid in increasing team member's engagement in the pursuit of departmental initiatives and goals and to help the department sustain strategic success while remaining adaptable to the evolving

needs of its community. Although the map here appears flat, in practice it has evolved into an interactive experience used to increase awareness around tactical and strategic success across all organizational service lines. With this type of tool in place, new hires and others throughout the organization can interact with the map to understand how this particular healthcare security team brings value to the greater organization. In the latest version of the map, users hover over icons to explore additional information and expand the engagement experience. For example, videos relating to each service line have been created in which line staff and leaders discuss how their particular team contributes to a shared purpose of prevention, preparedness, and protection. This team has seen the benefit of strategic mapping and now uses it to drive innovation and monitor the success of its operational excellence framework. Leaders have observed that sharing of the strategy map with the entire team has enhanced engagement and led to more agile execution of operational and strategic goals.



Figure 1. The University of Texas Police at Houston Strategy Map

TELLING YOUR TEAM'S STORY

One of the ways that an organization's health is measured is through the adequacy of its communication. Ideally information should be relatively free of distor-

tion and travel both vertically and horizontally across the boundaries in an organization [2]. To be successful, then, a team must be thoughtful about how it communicates its "value story" across a wide variety of audiences. Many

security leaders are comfortable using data and documentation to demonstrate how their teams are meeting certain performance measures and achieving goals or outcomes. But an innovative communications approach—storyboarding—can go beyond flat data displays to build organizational engagement and contribute to the collective success of any healthcare security team.

Storyboards are graphics tools that are typically used in the animation business to illustrate how a particular action or sequence of events will be displayed when set in motion. This approach can be adapted by healthcare security teams to visually demonstrate how their teams can create value. In Figure 2, the storyboard approach has been adapted to demonstrate a collective approach to protection. This visualization tool outlines how the five primary service lines of one healthcare security team work together on behalf of the shared purpose of prevention, preparedness, and protection. With the help of additional visuals, a presenter can walk through an incident scenario to bring one's purpose and value story to life.

PROVE IT!

Keep in mind that having a plan is just a start. After you map your strategic framework and outline your communications approach, a time will come when you are tasked with two simple words: “Prove it!”

Leaders should embrace this opportunity rather than interpreting it as doubt or as a sign of mistrust. Business leaders are trained and required to validate relevant metrics as part of ensuring that all business operations remain aligned with the greater goals of the organization. As a healthcare security team becomes a trusted business partner within an organization, it should expect that leaders will request additional input on planning and reported outcomes. This transparency supports trust in relationships, which has proven to be essential to the sustainability of any healthcare organization.

When (not if) your team is asked how it is planning to reach its goals and measure value, you may want to once again consider the benefits of visualization. In this case, data visualization and reporting tools may be used to create dashboards and trend re-



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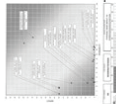


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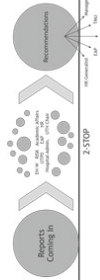


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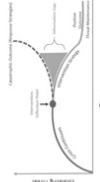


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Figure 2. Storyboard Example

ports like those often generated and monitored throughout the healthcare industry. When effectively deployed, data visualization tools can dynamically illustrate large volumes of information to both inform leadership and influence operational and strategic decisionmaking. If your goals and processes are strategically aligned with those of the larger organization, the demonstration of your outcomes in an easily understood way will quickly paint a picture of a team's success. Figure 3 demonstrates how one healthcare security team utilizes visualization to measure performance against return-rate goals and to monitor trends for recovered property by classification. When presented to operational and leadership teams, the visual depicts the overall value of the resources dedicated to this important program.

SERVICE EVALUATION: DOING MORE WITH THE SAME

Once a healthcare security team has realized initial strategic success, the challenge shifts to sustaining this progress in a fiscally responsible manner. Financial stability requires team lead-

ership to quantify the resources associated with each unit and/or service line. The leadership team will also need to work with managers and team members to define a method for evaluating the services' benefits to the organization. In more advanced cases, service evaluation will require the development and application of a formula that combines the assessments of each value driver (an activity that adds worth) by a cross-functional team of managers. One note of caution here: All services will have advocates and critics; the goal is to complete reviews in a quantifiable and consistent manner throughout all service lines.

Once costs and benefits are collected, cost-benefit analyses may be run to identify services that have lost value over time and to guide the reallocation of resources from lower-value services to a new strategic initiative or to reinforcing the value of core programming. For example, a healthcare security team that is managing repairs for electronic security systems with in-house staff may be found to be struggling due to system growth and never-ending training demands. Following program review, the

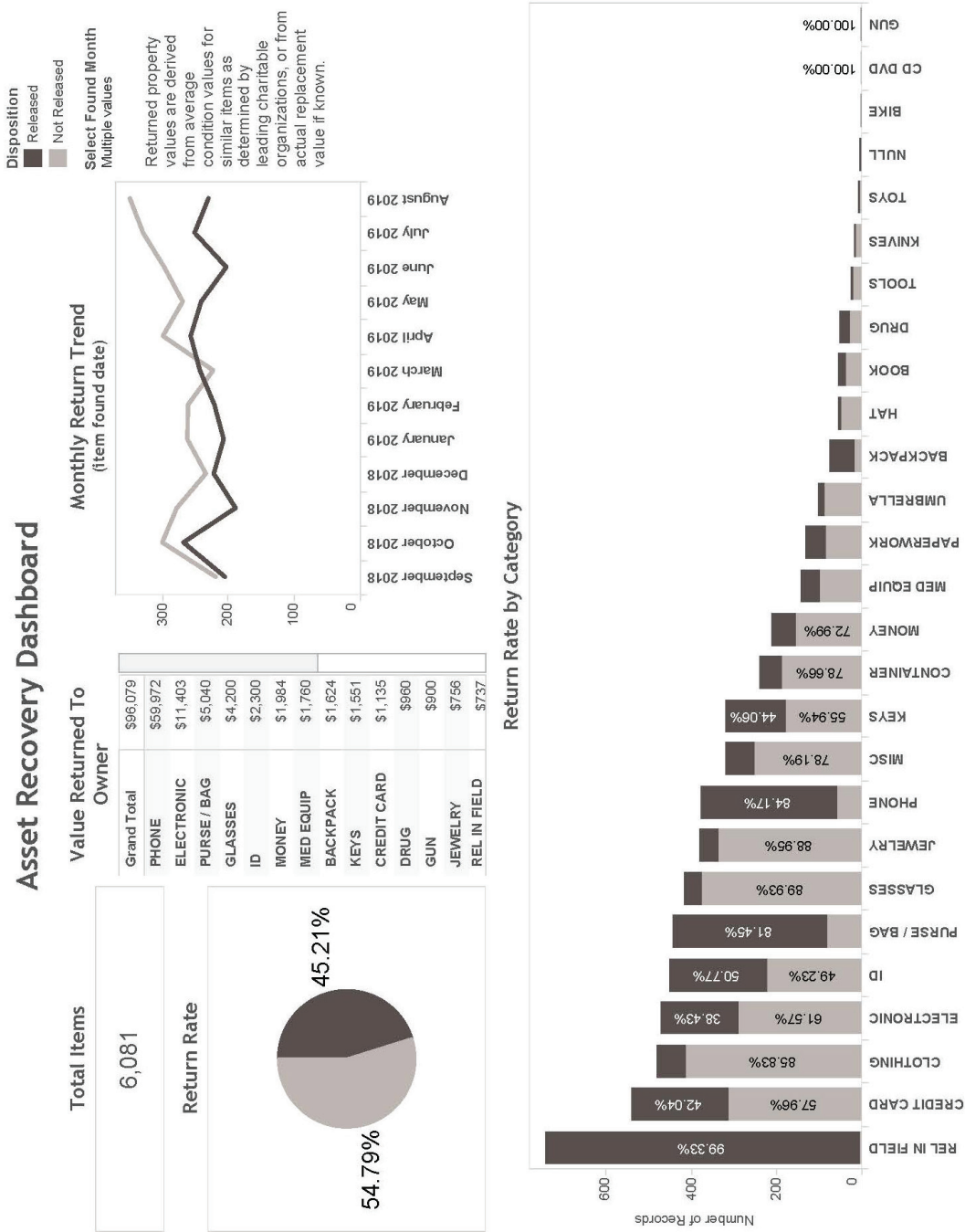


Figure 3. Dashboard Example

team's leadership may decide to reallocate this team to focus on preventive maintenance and emergency repairs. The break/fix responsibility can now be outsourced to a contractor better equipped and trained to meet the growing demand and complexity. If you perform these analyses and adjust your plans before requesting additional resources, this self-initiated recalibration will over time build credibility and trust with leaders throughout the organization.

A FEW LAST WORDS

Overall, healthcare security leaders will want to use strategic-planning tools and adapt business practices to demonstrate sustained success in providing value to the communities we serve.

The next generation of security leaders must embrace agility and adaptability in their planning and execution to ensure the healthy progress of their teams. As healthcare security moves into the future, a different way of thinking and the adoption of the tools described in this article will assist leaders in their continuous pursuit of service excellence. In future issues, I plan to delve more deeply into the approaches and tools described in this article.

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