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# Achieving Business Goals by Refining Your Strategic Niche

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# Learning Objectives



## I

### **To explore**

new ways of defining success and setting goals for your patient advocacy business

## II

### **To understand**

the core business functions common to all successful advocacy practices across the lifecycle of your unique clients

## III

### **To practice**

applying a strategic planning framework to your day-to-day activities to help you work smarter, not harder



Health Advocacy Now:  
Lessons From the Pandemic  
Nov 4-5, 2021 Conference

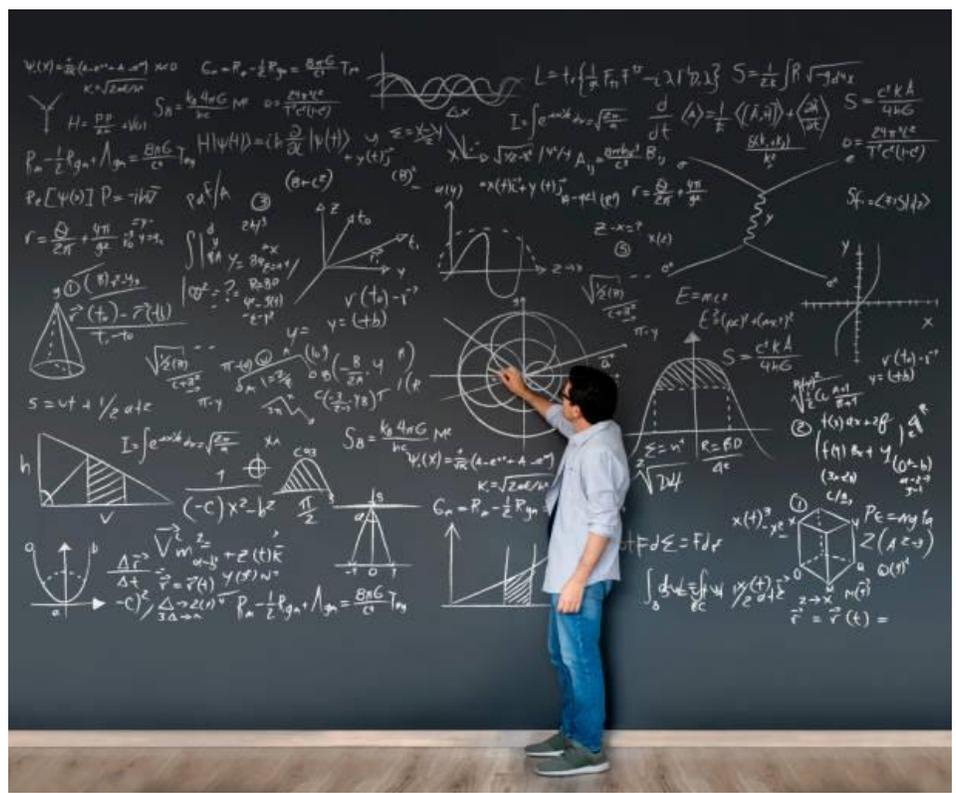
# Who needs a strategy?





# Defining Terms | *What is STRATEGY?*

What people think strategy is . . .



What it's actually about . . .



“Focus on Choice, Convenience and the Consumer, to become a Total Beverage Company”



“Combine leading brands, powerful business platforms and an enduring focus on our associates”



“Growth in 3 areas: consumer fixed business, enterprise business, and a wireless business.”



# Ingredients of a Strategy





# Whose vision? *YOUR* vision.

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Are you basing  
your actions on  
your vision . . .

or, on your  
temporary emotions,  
challenges, and even  
(unplanned)  
successes?

- ✓ **Freely chosen**, has not been imposed on you
- ✓ **Not a set of goals**; ongoing rather than fixed
- ✓ **Guides you** rather than constrains you
- ✓ **Active**, not static
- ✓ Allows you to get closer to living life **your own way**
- ✓ Brings you **freedom** from business/social comparisons

# How to begin to IDENTIFY your vision . . .



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- ✓ Deep down, **what matters to me?**
- ✓ What kinds of **connection** do I want?
- ✓ What do I want **my life to be about?**
- ✓ How do **I want to feel** most of the time?
- ✓ Which situations make me **feel most vital?**



# The Advocacy Client Lifecycle | 6 Key Stages



# Client Stages << >> Business Functions



## AWARENESS

Customer definition, promotional activities, sales channel management, referral network +



## ENGAGEMENT

Initial customer experience design, communications approach +



## EVALUATION

Reputation management, pricing, 'client filters', resource allocation +



## CONTRACTING

Internal operations, accounting, standard workflows, legal documents, tools +



## EXPERIENCE

Service model, resources, continuous learning/training, calendaring, billing/AR +



## SATISFACTION

Relationship management practices, wrap-up customer experience design +



# Business Functions << >> Daily Approach

Customer definition, promotional activities, sales channel management, referral network +

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Initial customer experience design, communications approach +

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Reputation management, pricing, resource allocation +

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Internal operations, accounting, standard workflows, legal documents, tools +

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Service model, resources, continuous learning/training, calendaring, billing/AR +

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Relationship management practices, wrap-up customer experience design +

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*Right clients, right time?*

*Efficiencies via tools, outsourcing?*

*Balancing daily activities / tasks?*

*Aligned with long-term strategy?*

*Need to course-correct?*

# In the end, Strategy is about BOUNDARIES



**Adam Grant**   
@AdamMGrant

It's impossible to please everyone.  
The question is whether you're  
disappointing the right people.

Part of setting healthy boundaries is  
deciding who you're willing to let down  
—and who has the right to make you  
feel guilty.

Not everyone deserves power over  
your emotions.

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THANK  
YOU!

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