The healthy business strategy tool

The Healthy Business Coalition

BSR®

Healthy Business

*[**hel**-thee **biz**-nis]* (noun)

A management approach that seeks to create value and optimize performance by improving the health of consumers, employees, and communities.

You have buy-in from key decision-makers to set a healthy business agenda. Now you need to engage internal and external stakeholders to identify the health issues that are most relevant to your company, and will have the greatest impact on target communities.

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Welcome to the Healthy Business Strategy Tool

This tool provides an approach to:

- **Align your social impact goals** with your business strategy
- **Engage stakeholders** to inform your decision-making
- **Surface potential priorities** for investment

It includes:

- **A process** for developing a healthy business strategy
- **A tool** to prioritize health issues based on business relevance and social impact

Why is This Tool Needed?

We created this tool because practitioners often face an uphill battle when trying to navigate the landscape of health issues and select the right ones for their companies to focus on.

We outline a step-by-step process to walk you through issue identification, stakeholder engagement, and priority-setting.

We've also created an Excel-based tool to support you in the process, developed in partnership with health experts and companies participating in BSR's Healthy Business Coalition.

How to Use this Tool

This tool is designed to help you identify the most strategic health issues.

First, we introduce the process to develop a healthy business strategy.

Chapter 2 – A Simple Process

Next, we walk through our Excel tool that will help you identify relevant health issues.

Chapter 3 – Initiate

Third, we explain how to collect useful information from internal and external stakeholders on these issues.

Chapter 4 – Consult

Finally, we explain how to leverage the Excel tool and stakeholder inputs, so that you will be equipped to set your healthy business priorities.

Chapter 5 – Prioritize

How to Develop a Healthy Business Strategy

We suggest a three-step process to pinpoint the most important health issues for your consumers, employees, and communities.

A Simple Process

Initiate	Consult	Prioritize
Building Your Team	Set Interview Objectives	Score Priority Issues
Set a Vision	Identify Stakeholders	Interpret Your Results
Review the Tool	Conduct Interviews	Confirm Priorities

Getting Started

Initiate

Before your team reaches out to stakeholders, develop a shared understanding of your objectives, the landscape of issues, and the strategy tool.

Build Your Team

A successful strategy will include inputs across organizational functions. Form a cross-functional team of committed colleagues to support the strategy development process.

Once you have the right people in place, establish a point person, divide roles and responsibilities, and set a work plan.

*The team will **drive accountability** on **timelines** and **milestones,** as well as **ensure greater buy-in** for the **strategy process** throughout the organization.*

Set a Vision

A clear vision is a critical foundation for an impactful and actionable strategy. Your vision informs what you will ultimately do, how you will do it, and how you will measure progress.

Metrics and targets to monitor your progress against objectives

Breakthrough programs which deliver impacts for employees and communities

Priority health issues and social determinants of health you seek to address

Your statement of objectives which informs issues, activities, and key performance indicators (KPIs)

Healthy Business Vision

To define your Healthy Business Vision first consider your company's ambition level, focus population, and location of impact.

Healthy Business Vision

LEVEL OF AMBITION	FOCUS POPULATION	LOCATION OF IMPACT
Do you want to be out in front or in the pack on healthy business issues? What is the capacity to support execution of the strategy? How ambitious can you realistically be?	Who do you want to reach? Are there specific consumer or employee groups you want to impact? Are there target populations you are trying to support?	Where can you mobilize the greatest resources and connections? Where are you already invested?

Healthy Business Strategy Tool

Overview

Take me to the full strategy Excel tool →

PURPOSE	CRITERIA TAB	ISSUES TAB	MAP TAB
This tool will help you surface the most important health issues to your company and to your stakeholders.	The criteria tab includes a standard list of criteria to evaluate each health issue for relevance to your business success and influence on social impact.	The issues tab includes a standard list of health issues for you to share with internal and external stakeholders and prioritize for further discussion.	The map tab is an automatically generated visual of your prioritized health issues. This tab can be used for further discussion, refinement, and decision-making.

Instructions

BEFORE INTERVIEW

1. Review the criteria to ensure your team is aligned on how each issue will be evaluated, i.e. by business success and social impact.
2. Review the issues list to ensure your team is aware of the universe of potential health topics that could be relevant to your company.
3. Familiarize yourself with the map tab and the expected graphical output.
4. Experiment with the “High” and “Low” scores on the issues tab. Toggle between the issues and map tabs to see how your scores impact the map.

AFTER INTERVIEW

5. After you conduct interviews with internal and external stakeholders, input the “High” and “Low” scores on the issues tab. Note that your team should discuss the scores to reach a consensus value for each issue.
6. Review the automatically generated map, and please note that many issues will overlap. Before manually moving the issues with your mouse, evaluate the placement to determine whether the results reflect what you heard during stakeholder interviews and your judgments. You are welcome to then manually move the issues with your mouse, but doing so will unlink each issue from its respective score.

Review the Criteria

The strategy tool prioritizes topics according to their relevance to standard business and social-impact criteria. Review the evaluation criteria and adjust the weighting to reflect your organization's goals.

VALUE PROPOSITION
25%
Importance to ability to meet customer needs and those of key partners including suppliers, vendors, and community groups

BRAND REPUTATION
25%
Contribution to brand tenets and reputation with key stakeholder groups

FINANCIAL DRIVERS
25%
Contribution to revenue generating activities (includes operating, investing, and financing) or reduction in cost structure

EMPLOYEE ENGAGEMENT
25%
Importance to attract, train, and retain high quality talent, now and in the future (includes productivity enhancements like reduced turnover)

ALIGNMENT WITH NATIONAL HEALTH PRIORITIES
25%
Compliance with national health norms set forth by CDC, NIH, WHO, and others in addition to activist groups and a civil society

NEEDS OF TARGET POPULATIONS
25%
Ability to improve or maintain health outcomes for target populations, including vulnerable groups such as low-income communities

IMPACT ON HEALTH DETERMINANTS AND OUTCOME
25%
Ability for the company to make a difference on the issue itself through its owned and outsourced operations

SIGNIFICANCE OR SEVERITY OF ISSUE
25%
Magnitude of problem, as indicated by impact on vulnerable populations in particular

Review the Categories

Health outcomes are driven by a wide range of conditions – the circumstances in which people are born, grow, live, work and age. In fact, over 50% of what makes us healthy is determined by our behavior, our environment, and our socioeconomics.[1]

This tool groups health issues into six main categories. All categories are important, but the purpose of the tool is to identify those issues that best align with your healthy business vision.

Access to Care	Disease Burdens	Economic & Social Determinants	Healthy Behaviors	Physical Environment	Work Environment

1. Bipartisan Policy Center, June 2012

Review the Issues

There is a universe of potential health topics that could be relevant to your strategy. For example, below are the "Access to Care" issues and definitions:

	ISSUES Get familiar with the potential issues before engaging stakeholders.	DEFINITIONS Review issue definitions and adjust where necessary to align with your organization's own terminology and understanding.
Access to Care	Primary and specialist care	Ease of setting appointments and seeing primary care physicians and specialists for physical and mental health services
	Affordability of health services, medicines, and health technologies	Ability to access treatments with respect to pricing and reimbursement
	Accessibility of providers	Geographic proximity to pharmacies, clinics, health services and resources
	Quality of care	Ability to obtain clinical care that is effective, efficient, accessible, acceptable/patient-centered, equitable, and safe
	Safety	The safety of services including adequacy and compliance with medical standards

Gathering Insights

Consult

You've set a vision and familiarized yourself with the strategy tool—now you will gather external insights to help you prioritize.

Set Interview Objectives

Establishing clear objectives will help you build an interview guide and ensure you lead productive and actionable conversations.

QUESTIONS FOR YOUR INTERVIEWEE

TOP 5 ISSUES *	DRIVERS	TRENDING RISKS	LEADERSHIP RISKS	STRATEGIES
Please select top 5 health issues	Why do you think this issue is important for our company?	What public health risks may impact the company, as a policy issue or with respect to our stakeholders?	How can we differentiate ourselves in our industry and within the private sector?	What companies are winning on health and how?
Which issues impact business effectiveness goals including revenue generation, brand identity, and operational efficiency, among others?	What is driving corporate activity on employee and community health?	What risks do you foresee in the long term for our business as they relate to health?	Which health issues are opportunities for our business to achieve social impact and benefit our business?	What resources can you share with us to contribute to our healthy business strategy?
Which issues impact social impact goals including improvement in social determinants of health and health outcomes?	How can our business drive value from investment in health?		Do you see other alignments between the list of health issues and our corporate strategy?	

** As context, provide the list of health issues and definitions included in the Healthy Business Strategy Tool*

Identify Stakeholders

Stakeholder insights will form the backbone of your healthy business strategy. Choose a targeted list of individuals and organizations to provide valuable perspectives of your company's impacts, community priorities, and opportunities for collaboration.

External Interviewees

Seek out external stakeholders that can challenge your assumptions, provide expertise, and inspire innovation.

Implementation partners that have a local presence and in-depth knowledge of community health issues

Business coalitions that collect, analyze, and share best practices among the private sector

Customers with stated interest or need for health-related products and services

Academic institutions that develop thought leadership on effective health strategies and interventions

Funding Organizations with mission-driven funding vehicles, designed to accelerate impact

Strategic partners with a sophisticated yet external understanding of your business

Internal Interviewees

Identify internal stakeholders that can provide insight on your company's health impacts, intersections with employees and communities, and implications of activities for your business operations.

- **Human Resources/Employee Engagement**
- **Corporate Strategy**
- **Sales and Marketing**
- **Government Affairs**
- **Corporate Foundation or Philanthropy**
- **Corporate Social Responsibility or Sustainability**
- **Facility Management and Operations**
- **Supply Chain and Procurement**

Conduct Interviews

Get the most from your interviews through pre-interview preparation, structured and consistent conversations, and post-interview follow-up and ongoing engagement.

PREPARE

Pre-read: Introduce stakeholders to your company, the interview objectives, and questions in advance of the conversation to enable time for reflection.

Background research: Familiarize yourself with the stakeholder's expertise and experience to target your conversation to areas where they can provide greatest insight.

INTERVIEW

Follow the guide: Show respect for interviewees by sticking to the planned questions and timeframe. This also helps keep the scope of research focused and manageable.

Bring in external support: Depending on the level of resources invested, you can bring in external consultants, who can help provide an unbiased or additional point of view.

FOLLOW-UP

Say thanks: Sending a follow-up email is a best practice to make stakeholders feel valued as an integral part of the process.

Ongoing engagement: You can use interviews to build relationships with stakeholders, and subsequently engage them on a regular basis. Email groups, teleconferences, and an advisory panel are modes of engagement to ensure ongoing input from stakeholders.

Ranking the Issues

Prioritize

Based on internal and external insights gathered, it's time to score health issues and identify priorities.

Score the Issues

Now that you've culled the issue list down and identified business and stakeholder priorities, you're ready to apply scores to health issues in the Excel tool.

KEY INPUTS

1

KEY FINDINGS FROM STAKEHOLDER INTERVIEWS

2

HANDS-ON WORKSHOP WITH TEAM TO COLLABORATIVELY PROCESS INTERVIEW FINDINGS

Relevance to business success				
Value proposition	Brand reputation	Financial drivers	Employee engagement	Score
High	High	Low	Low	50.0
High	High	Low	Low	50.0

Determine the "High" and "Low" scores on the "Issues" tab for each issue. If a category or issue did not come up with your stakeholders, score it "Low" across all criteria to deprioritize.

Interpret your Results

The Excel tool will automatically create a healthy business strategy ("materiality") matrix for your company. Here's how to read the results:

Interpret your Results

Identify those health issues that show opportunity for leadership and investment. Also take note of health issues that are limited to pure-play philanthropy or pure-play corporate strategy. Remember to keep ambition levels consistent with the vision that you have set.

The initial results may contain some surprises that merit further analysis. As you consider adjustments to your scores, refer to the following guiding questions:

Are there issues that deserve to have higher or lower priority?	Have recent events shifted the way stakeholders may view these issues?	Does a certain theme or category of issues stand out in significance?

Consider your Assets

Engage your cross-functional team to understand which unique assets you can deploy in the execution of your healthy business strategy.

Capital	Employment	Offices & Facilities
Policy Advocacy & Influence	Products and Services	Marketing & Communications
Partnerships & Stakeholder Relationships	Training and Development	Philanthropy

Confirm Priorities

As you identify the issue priorities of your healthy business strategy, gather as a team to revisit the vision you set at the beginning of the process and test your conclusions. Consider:

WHY?
are we thinking about health in the first place?

WHAT?
health outcomes do we want to achieve?

HOW?
do we want to make an impact?

Confirm Priorities

Now you're ready to confirm your priorities and begin to consider what actions you will take to realize your vision.

1. **What are our healthy business leadership opportunities?**

   A -

   B -

   C -

   D -

2. **Why are these priorities relevant to business success?**

   A -

   B -

   C -

3. **How can we act on these opportunities?**

   A -

   B -

References

1 The **Behavioral Risk Factor Surveillance System (RFSS)** is a system of health-related phone surveys about risk behaviors, chronic health, and prevention access and services. The system collects data in all 50 states, completing almost half a million interviews each year.

"Behavioral Risk Factor Surveillance System" Centers for Disease Control and Prevention. 2015. Accessed via http://www.cdc.gov/brfss/

2 **BSR's "Advancing Access to Healthcare Metrics"** working paper was prepared on behalf of BSR's Healthcare Working Group, a group of 15 global healthcare companies hosted by BSR. The paper helps companies improve their ability to measure and report their performance on access to healthcare by improving the quality and comparability of metrics.

"Advancing Access-to-Healthcare Metrics" Business for Social Responsibility. May, 2016. Accessed via https://www.bsr.org/our-insights/report-view/advancing-access-to-healthcare-metrics.

3 The **County Health Rankings** help U.S. communities identify, measure, and improve on the factors that influence health outcomes.

"County Health Rankings National Data" Robert Wood Johnson Foundation County Health Rankings & Roadmaps. 2016. Accessed via http://www.countyhealthrankings.org/rankings/data.

4 **The Global Reference List** includes specific core health indicators, which also link to the Sustainable Development Goals. These indicators focus on global health issues and risk factors, which are especially relevant for companies with operations in emerging economies.

"Global Reference List of 100 Core Health Indicators" World Health Organization. 2015. Accessed via http://www.who.int/healthinfo/indicators/2015/metadata/en/.

5 **Vitality Institute's Reporting on Health** provides a roadmap for health and for companies to measure and report on health factors and outcomes, which go beyond traditional occupational health and safety.

"Reporting on Health: A Roadmap for Investors, Companies, and Reporting Platforms." January, 2016. Pg. 28. Accessed via http://thevitalityinstitute.org/site/wp-content/uploads/2016/01/Vitality-HealthMetricsReportingRoadmap22Jan2016.pdf.

6 A joint project between Gallup, Healthways, and Health eVillages, the **Well-Being Index** is a comprehensive accounting of health and well-being outcomes globally. Based on interviews conducted in over 150 countries, the research measures indicators relating to access to care and other social determinants.

"Well-Being Index, U.S. Community Well-Being Rankings and Access to Care" Gallup-Healthways. 2016. Accessed via http://info.healthways.com/hubfs/Well-Being_Index/Gallup-Healthways_State_of_American_Well-Being_2015_Community_Rankings_vFINAL.pdf?t=1472574210525.

Conclusion

You are now equipped to build a healthy business strategy.

If you have suggestions on how we can improve this tool, or if you would like to share your own challenges and successes in developing a healthy business strategy, please get in touch with the Healthy Business Coalition at:

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