The healthy business strategy tool
The Healthy Business Coalition
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
- Building Your Team
- Set a Vision
- Review the Tool

Consult
- Set Interview Objectives
- Identify Stakeholders
- Conduct Interviews

Prioritize
- Score Priority Issues
- Interpret Your Results
- Confirm Priorities
Getting Started
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.

- **Healthy Business Vision**: Your statement of objectives which informs issues, activities, and key performance indicators (KPIs).
- **What Issues You Focus On**: Priority health issues and social determinants of health you seek to address.
- **How You Achieve Impact**: Breakthrough programs which deliver impacts for employees and communities.
- **KPIs**: Metrics and targets to monitor your progress against objectives.
Healthy Business Vision

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

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

Overview

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>CRITERIA TAB</th>
<th>ISSUES TAB</th>
<th>MAP TAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>This tool will help you surface the most important health issues to your company and to your stakeholders.</td>
<td>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.</td>
<td>The issues tab includes a standard list of health issues for you to share with internal and external stakeholders and prioritize for further discussion.</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

- **Brand Reputation**
  - **Contribution to brand tenets and reputation with key stakeholder groups**
  - **25%**

- **Financial Drivers**
  - **Contribution to revenue generating activities (includes operating, investing, and financing) or reduction in cost structure**
  - **25%**

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

- **Alignment with National Health Priorities**
  - **Compliance with national health norms set forth by CDC, NIH, WHO, and others in addition to activist groups and a civil society**
  - **25%**

- **Influence on Social Impact**
  - **Ability for the company to make a difference on the issue itself through its owned and outsourced operations**
  - **25%**

- **Needs of Target Populations**
  - **Ability to improve or maintain health outcomes for target populations, including vulnerable groups such as low-income communities**
  - **25%**

- **Significance or Severity of Issue**
  - **Magnitude of problem, as indicated by impact on vulnerable populations in particular**
  - **25%**

**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.
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.

1. Bipartisan Policy Center, June 2012
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:

<table>
<thead>
<tr>
<th>Access to Care</th>
<th>ISSUES</th>
<th>DEFINITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary and specialist care</td>
<td>Ease of setting appointments and seeing primary care physicians and specialists for physical and mental health services</td>
</tr>
<tr>
<td></td>
<td>Affordability of health services, medicines, and health technologies</td>
<td>Ability to access treatments with respect to pricing and reimbursement</td>
</tr>
<tr>
<td></td>
<td>Accessibility of providers</td>
<td>Geographic proximity to pharmacies, clinics, health services and resources</td>
</tr>
<tr>
<td></td>
<td>Quality of care</td>
<td>Ability to obtain clinical care that is effective, efficient, accessible, acceptable/patient-centered, equitable, and safe</td>
</tr>
<tr>
<td></td>
<td>Safety</td>
<td>The safety of services including adequacy and compliance with medical standards</td>
</tr>
</tbody>
</table>

Get familiar with the potential issues before engaging stakeholders. Review issue definitions and adjust where necessary to align with your organization’s own terminology and understanding.
Gathering Insights
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**

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

* 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.

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:

- **Pure-Play Philanthropy**: Understand how your company can tackle these issues that provide social value but may lack business rationale.
- **Leadership**: Act on these opportunities and allocate resources accordingly.
- **Low Priority**: Monitor these issues as needed but do not include in your healthy business strategy.
- **Pure-Play Corporate-Strategy**: Consider how you manage these issues but not as part of your healthy business strategy.
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.

<table>
<thead>
<tr>
<th>Capital</th>
<th>Employment</th>
<th>Offices &amp; Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Advocacy &amp; Influence</td>
<td>Products and Services</td>
<td>Marketing &amp; Communications</td>
</tr>
<tr>
<td>Partnerships &amp; Stakeholder</td>
<td>Training and Development</td>
<td>Philanthropy</td>
</tr>
<tr>
<td>Relationships</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.


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.


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


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.


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.


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.

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:

healthybusiness@bsr.org