



2017  
**UNION LEADERS  
LEADING PARTNERSHIP**

COALITION OF  
KAISER PERMANENTE  
**UNIONS**

# Planting the “Story Tree”

Using two formats to design effective and engaging presentations

PRESENTED BY: Elaine Evans

# Agenda for the day

A white rectangular card is tilted at an angle. It features a vertical list of five checkboxes. The first four checkboxes are marked with green checkmarks. A green pencil is positioned at the top right of the card, with its tip pointing towards the fifth checkbox. The card is set against a dark teal background.

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**Learn two ways to present information**

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**Crafting memorable messages**

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**SBAR and Story tree**

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# Guiding principles for participation



- Be present and participate.
- Take charge of your own learning.
- Stay open – respect others' viewpoints.
- Preserve confidences – “Vegas Rules”
- Practice, practice, practice...
- Have fun!

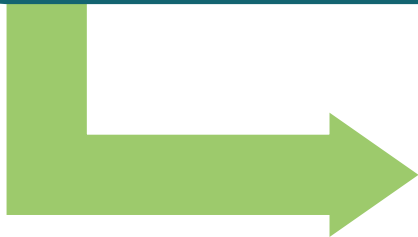


# Audience needs?

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What do you need  
to tell them?



Why do they need  
to hear it?



How do they want  
to hear it?

# Two structures commonly used at KP



## Story tree



# SBAR: What does it stand for?



## **S**ituation

- A concise (one sentence) statement of the problem/situation.
- *What is going on now.*

## **B**ackground

- Pertinent and brief details related to the situation.
- Information obtained by research.
- *What happened.*

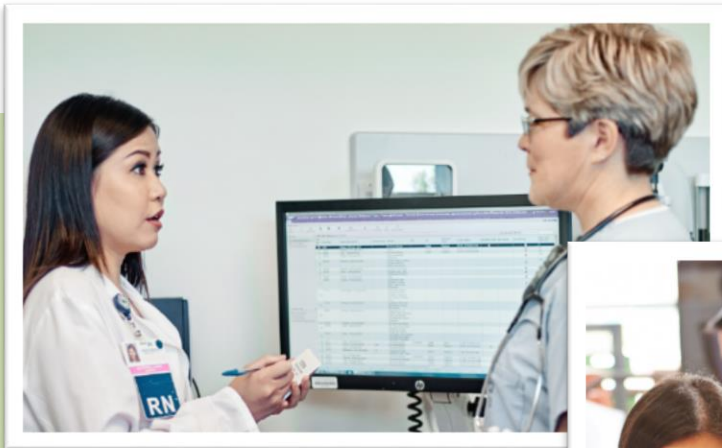
## **A**ssessment

- Analysis and considerations of options
- Impact if not resolved or brought to closure
- *What you found/think.*

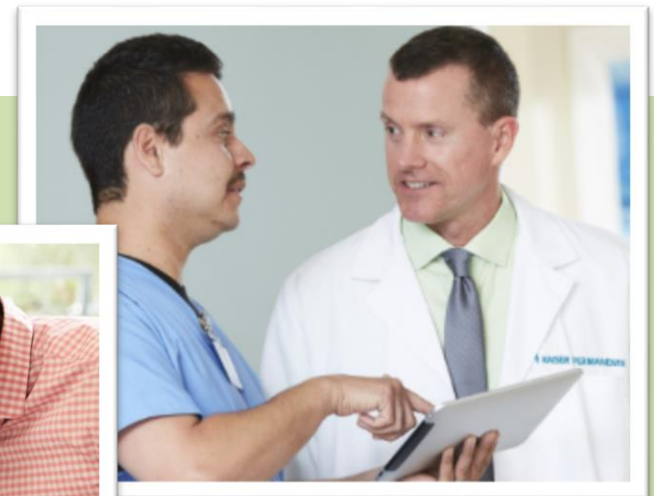
## **R**ecommendation

- Action requested/recommended.
- Commitments you are seeking approval for
- *What you want.*

# SBAR / Kaiser Permanente



**Physician to clinician**



**Nurse to physician**



**Staff to manager**

# Traditional flow of a presentation

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## Traditional flow

Opening

Background

Supporting points

Bottom line

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## SBAR flow

Situation

Background

Assessment

Recommendation

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**Start here!**

Two red arrows originate from the text "Start here!" and point towards the "Bottom line" of the Traditional flow and the "Recommendation" of the SBAR flow, indicating that both presentation methods should begin at the end of the sequence.



# B.L.U.F. – alternative to traditional flow



## **Alternative flow**

### **Bottom line + ask**

Opening

Background (if needed)

Supporting points

### **Review bottom line + ask**

## **Alternative SBAR flow**

### **Concise recommendation**

Situation

Background

Analysis

### **Review recommendation**

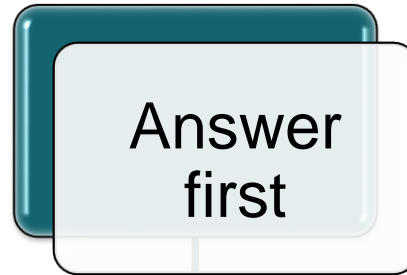
**B.L.U.F. = Bottom Line Up Front**

# Definition of “Answer first”

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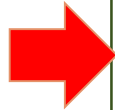


A style of business communication in which the **main idea or “answer” is stated first.**



- Main idea or most relevant piece of information that your audience needs to know.

# Tweaking SBAR for greater impact



## **R**ecommendation

**“ANSWER FIRST”**

“Ask for approval to reallocate \$1.5 million from Relocation Strategy (RS) to the Employee Development Project (EDP).”

## **S**ituation

Employee Development Project needs \$1.5 million to complete the project on schedule.

## **B**ackground

The project was brought forth to assist with development of our employees. Funds were to be allocated in the 2017 budget.

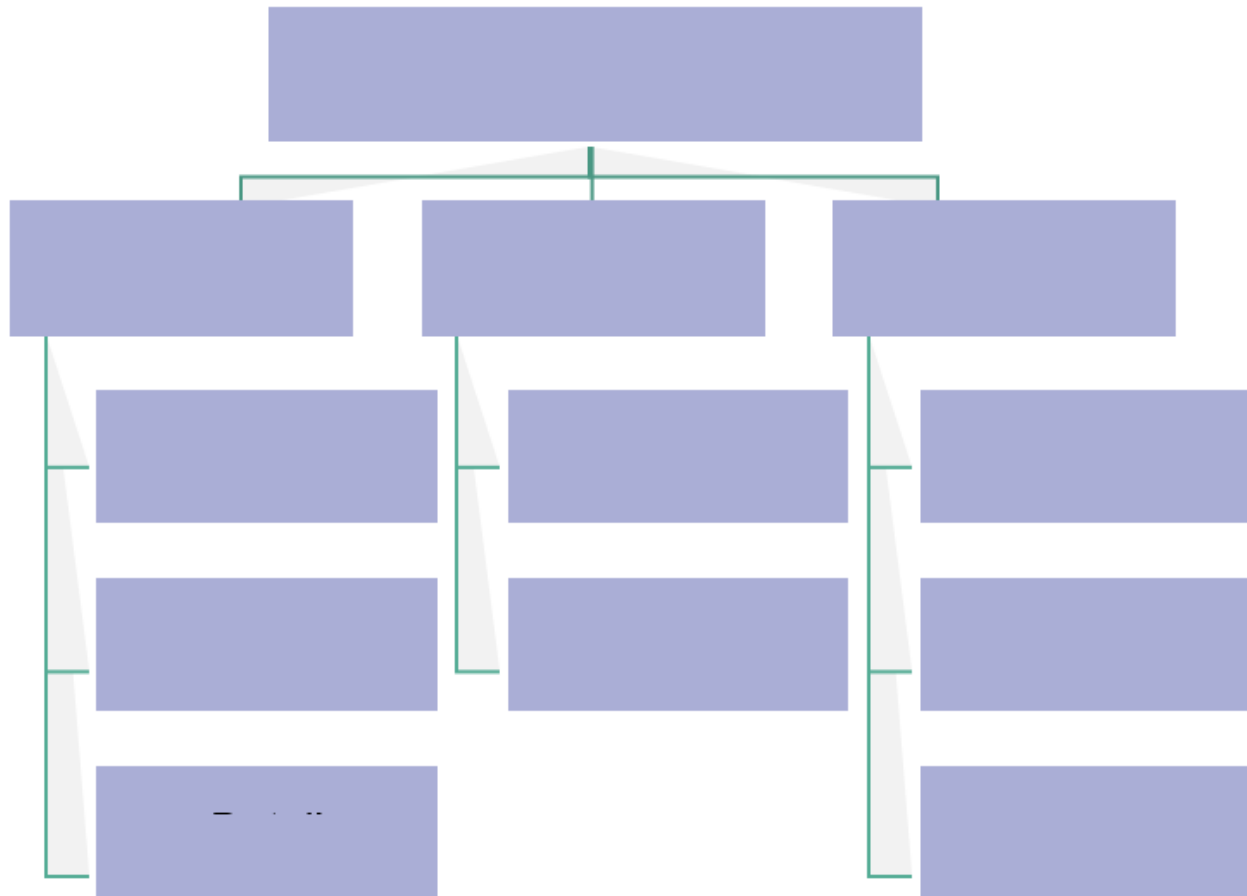
## **A**ssessment

Surplus funds are available due to overestimated budget and has already been approved for EDP by leaders of HR, IT, Quality, Finance, Operations and Sales.

## **R**ecommendation

Remaining \$1.5m moved from Relocation Strategy to Phase III - Employee Development Project.

# The story tree structure



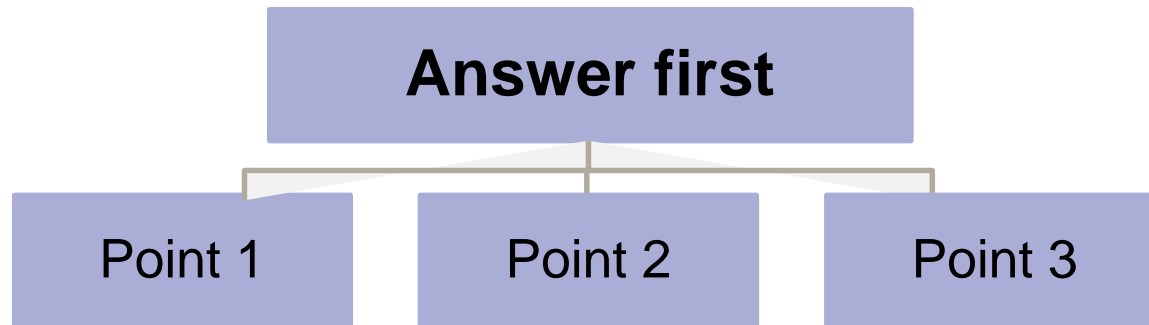
ask”  
n

Supporting points  
conclusions

Essential details  
Supporting facts  
Contextual info  
Evidence or proof  
Results or findings

# The story tree structure

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# Flexibility of the story tree (Option 1)



**Answer first**

**Get approval to  
reallocate \$\$**

**Call to action or “ask”**

- Recommendation
- Bottom line

**Funds  
needed**

The Employee Development Project needs \$1.5 million to complete the project on schedule.

**Surplus  
funds**

The project was brought forth to assist with development of our employees.

Funds were to be allocated in the 2017 budget.

**Approved  
by**

Surplus funds are available due to overestimated budget Phase II of the RS and has already been approved to move to EDP by the leaders of HR, IT, Quality, Finance, Operations and Sales.

**Key supporting points**

- Key conclusions

**Essential details**

- Supporting facts
- Contextual info
- Evidence or proof
- Results or findings

**Get approval to reallocate \$\$**

# Flexibility of the story tree (Option 2)



Answer first

**Get approval to  
reallocate \$\$**

**Call to action or “ask”**

- Recommendation
- Bottom line

Funds  
needed

**Surplus  
funds**

**Approved  
by**

**Key supporting points**

- Key conclusions

Detail

The project was brought forth to assist with development of our employees.

Has been approved by the leaders of HR, IT, Quality, Finance, Operations and Sales.

Detail

Funds were to be allocated in the 2017 budget.

Detail

**Essential details**

- Supporting facts
- Contextual info
- Evidence or proof
- Results or findings

**Get approval to reallocate \$\$**

# ACTIVITY

## Team R-SBAR and story tree

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- Pick up cards R-SBAR 1
- Determine correct order
- Practice reading statement as one unit





# R-SBAR – Activity 1



## **R**ecommendation

I'd like your support to bypass the approval process for the Synergy project.

### **S**ituation

The project is in jeopardy of not being completed because one of the mandatory approvers is out on leave. Due to this delay, I am concerned about it being completed by the due date.

### **B**ackground

The Synergy project, started on time in January and has progressed very well. There have been a few difficulties, but we've always been able to work through them with minimal effort to keep us on track. But this latest issue has the ability to derail the results and set us back.

### **A**ssessment

There are numerous options we could employ to resolve the issue. We could completely bypass the approval process and move forward. We could go with the three approvers we have now (Bill, Susie and John) and disregard the need for the fourth approver (Ann) or we could substitute, Larry for Ann and move the project forward.

### **R**ecommendation

My suggestion is that we bypass the approval process altogether. It won't have a major effect on the result and is not integral to the final outcome.

# Story tree – Activity 1



## Recommendation

I'd like your support to bypass the approval process for the Synergy project. There are three paths we could take:

<b>P</b>	We could bypass the approval process and move forward to keep the project on track.	<b>P</b>	We could change the approval process and go with just three approvers (Bill, Susie and John) and disregard the need for the fourth approver (Ann).	<b>P</b>	We could substitute Larry's approval for Ann's and move forward.
<b>D</b>	For this phase of the project the approval is not necessary. It was put in as a precaution in case the project was running over budget and since we are on track, there is really no need for the extra approval.	<b>D</b>	If we really feel that the approval is necessary, Bill, Susie and John are already on board and have given their approval. The only hold up is that Ann is out and will not return until next quarter. Waiting for her will really impact our timeline.	<b>D</b>	Since Larry has been kept up to date on the entire process, he could easily step in for Ann and become a part of the approval process.

## Recommendation

So, again, I think the option that's in our best interest would be to just bypass the approval process.

# R-SBAR – Activity 2



## **R**ecommendation

I'd like to suggest we increase our salary range for the IT Business Analyst position.

### **S**ituation

Kenn Dixon has been very patient with us and I'd hate to lose him as a perspective employee. He is the perfect choice for this position and has all the skills we are looking for.

### **B**ackground

Kenn has been in our database for the last year. He interviewed, very successfully for this position ten days ago and was very well liked by the leadership team and they would like to make him an offer. The difficulty is that the top of the salary range for this position is \$110,000, but Kenn's current salary is \$115,000 and his bottom line is \$118,000.

### **A**ssessment

Our options are to ask the team to choose a lesser qualified candidate that would fit into the salary range, hold firm on the top of the salary range, or change the job family to increase the range.

### **R**ecommendation

- My suggestion, in this situation would be to increase the range to ensure client satisfaction.

# Story tree – Activity 2



## Recommendation

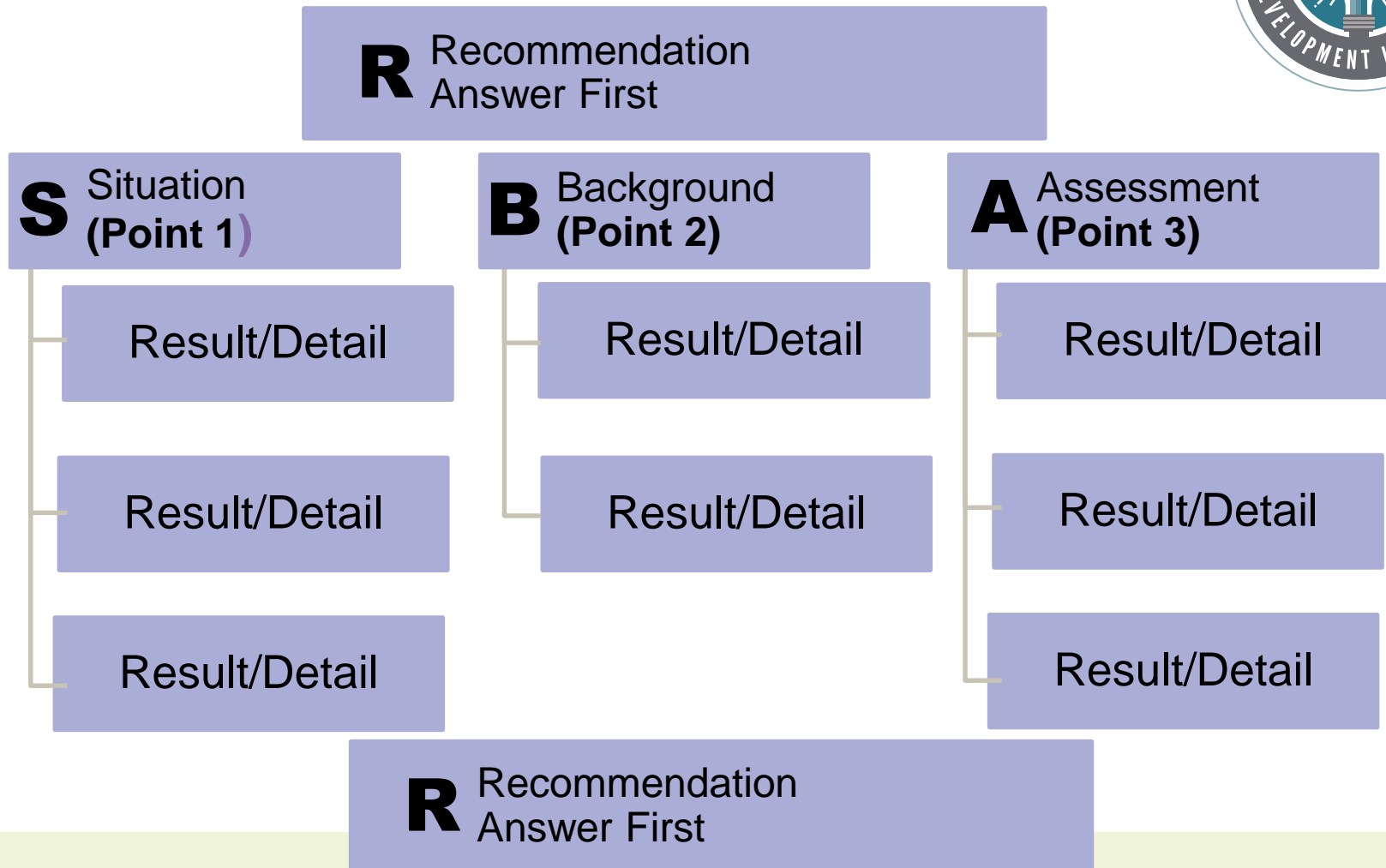
I'd like to suggest we increase our salary range for the IT Business Analyst for Finance position, for Kenn Dixon. Here are our three options:

<b>P</b>	We could choose a candidate with less experience.	<b>P</b>	We could move the position to a different job family to increase the pay scale.	<b>P</b>	We could take our chances and hold firm on the current salary.
<b>D</b>	Kenn was the leadership teams top choice by far, but there were a few other candidates who were qualified, but didn't have any where near the amount of experience that Kenn has. Choosing one of them could possibly work, but would take much more hands-on development work. Kenn could walk right in and be functional.	<b>D</b>	Even though the position is listed in the IT job family, it is still considered a Finance position. The salary ranges for Business Analysts in Finance are much higher and would fit right into the area that Kenn was expecting. It would require some maneuvering, but could easily be done.	<b>D</b>	We could give Kenn the offer as is and hope that he is willing to take less salary. Kenn really wants to come work for us, and the leadership team really likes him. In this situation, we could run the risk of him walking away from our offer and I'm sure the client would be very disappointed.

## Recommendation

So, again, I think the option that's in our best interest would be to just bypass the approval process.

# How R-SBAR and story tree align



# ACTIVITY

## Create R-SBAR or story tree



- From your assigned scenario
- Identify your three supporting points
- Sketch out structure using either R-SBAR or story tree.
- Share and get feedback from partner.

R-SBAR

Recommendation		What are you asking for?	
Situation	What's going on now?	Background	What happened?
Assessment	What are your findings?	Recommendation	What do you want done?

Story tree

Recommendation			What are you asking for?		
Main points					
Main point 1		Main point 2		Main point 3	
Essential supporting details					
Details - Point 1		Details - Point 2		Details - Point 3	

**Use your Creative License  
if you need to!**

# Where to learn more

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## Books

- HBR Guide to Persuasive Presentations, by Nancy Duarte
- Resonate – Present visual stories that transform audiences – Nancy Duarte
- Presentation Skills 201: How to Take It to the Next Level as a Confident, Engaging Presenter – William R. Steele

## Websites

- <http://www.genardmethod.com/>
- <http://www.duarte.com/blog/free-multimedia-version-of-resonate/>

# Enjoy the journey

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