

Target Audience

All professions... are conspiracies against the laity... the military conspiracy, the legal conspiracy, the sacerdotal conspiracy, the pedagogic conspiracy, the royal and aristocratic conspiracy, the literary and artistic conspiracy, and the innumerable industrial, commercial, and financial conspiracies, from the trade unions to the great exchanges, which make up the huge conflict which we call society.

George Bernard Shaw, *The Doctor's Dilemma*

DEAL! is aimed at professionals: accountants, advisors, architects, bankers, brokers, doctors, lawyers, nurses, teachers, therapists and others with technical expertise who guide clients in crisis. You are my audience.

You should be angry when George Bernard Shaw accuses you of “conspiring against the laity.” He charges you with guiding your clients to decisions that are good for you, not for them. Those are fighting words. I am here to help you fight these charges of professional-centered practice.

Specifically, this book presents a new *DEAL* for professionals: new heights of client-centered practice through better discovery, engagement, and leverage. My prescriptions for discovery and engagement will help you and your colleagues surface and attend to the true needs of your clients. You will guide clients to good decisions on their terms. My prescriptions regarding leverage will help you sustain the cost-effective delivery of such client-centered practices.

How does Shaw’s conspiracy against the laity arise in the first place? You go through arduous training and licensing to become the professional of your dreams. Then you work incredibly hard, in an

increasingly rigid regulatory environment that encroaches on your professional autonomy and flexibility.

I see up close how hard you work. Recently one of my physician colleagues was nominally on vacation. But her patients were not on vacation. So she checked her emails and jumped in to direct care, from far away, when a patient's trajectory took a turn for the worse. That's the norm among professionals. There is no such thing as taking a full break. You're always on duty, to some degree.

So you have no intention of conspiring against your clients! How dare Shaw suggest this! Yet along the way, you inevitably fall into a gap between professionals and clients, a gap known as the agency problem.

The agency problem simply states, from the client's point of view, that a professional acting on my behalf may not act in my interest.

Some degree of mission drift is inevitable between professionals and clients. Professionals cannot know client interests at all times. We clients are, after all, strangers even to ourselves.

However, professionals should always strive to be true fiduciaries, putting the client agenda ahead of their own, and guiding clients to good decisions on that basis. You can continuously improve in this quest. That is the essence of what I will call *professionalism*—the drive to guide clients to good decisions that advance their agenda, and the drive to continuously improve.

Against considerable odds, many of you are able to practice in this way as fiduciaries. For example, when I was considering LASIK eye surgery, I went to see Dr. Richard Abbott at the Beckman Vision Center at UCSF. People magazine had profiled Dr. Abbott as the rare LASIK eye surgeon who still wore glasses himself. And, true to form, after eliciting my goals and priorities, he counseled me against having surgery, given my condition.

Dr. Abbotts of the world, I salute you. I believe even you can benefit from this book because there is always room for

improvement, and the highest achievers are always the most devoted to the pursuit of perfection.

Others among you may be in more dire straits, despairing of the environment in which you practice, and losing hope that you can be truly client-centered. You look around, including in the mirror, and you see professional-centered practice more than client-centered care.

What are the hallmarks of professional-centered practice? In the words of the Institute of Medicine, “Care is organized for the benefit of the professional and/or institution.”

For example, in professional-centered encounters:

- The professional speaks more than the client.
- When the client does speak, the professional interrupts early and often.
- The professional uses jargon.
- The professional guides clients to decisions that may not serve the deeper client agenda.
- In fact, the professional-centered practitioner would prefer not to surface the deeper client agenda, because it is inconvenient and gets in the way of advancing the professional agenda.

In professional-centered delivery systems, the professional is expensive and fees increase every year. The professional fiercely defends against encroachment on professional turf by other providers. And in professional-centered delivery systems, the billing system works even when nothing else does.

In professional-centered politics, advocates lobby for doctors rather than patients; lawyers rather than laypeople; teachers rather than students.

I understand that professionals need to operate with a sustainable business model and in working conditions that allow

them to serve client interests. I realize that revenue and pay and caseload and working hours are important issues for professionals.

In my view, however, the key to advancing client interests sustainably is to focus first on the client interests and second on engineering a service delivery model that efficiently supports such client-centered practice. This is what disruptive innovators are doing across the board.

In contrast, the professional system, by definition, has prioritized the institutionalization of its service delivery model, and is often focused on defending it rather than on truly advancing client interests. This is *professionalization* rather than *professionalism*.

If you are candid and self-aware, you will admit that this is one of the reasons, however implicit, that you became a professional: because of the legitimacy and security bestowed upon your career path by professionalization. Now, further down the road, you see that professionalization is a double-edged sword, and that your professional structures both serve and hinder client interests.

What I am saying is that *the long-term goal of a profession should be to put itself out of business*. Doctors should be working on preventive health so that the use of medical care decreases every year. Lawyers should be simplifying the legal system so that laypeople can navigate it alone. Teachers should be designing curricula that students can self-administer.

Paradoxically, as you put yourself out of business, new business structures will emerge, because there is always more value to add to people's lives if we can only adapt quickly enough.

Instead, as a class, professionals, whether inadvertently or intentionally, erect barriers to advancing client interests, rather than tear them down.

My methods for discovery, engagement, and leverage will help you tear down those barriers from the professional side, before laypeople lay waste to your profession from their side of the

ramparts. I am here to help you in your quest to become or remain client-centered, and to resist becoming more professional-centered.

Reading this, you are probably beginning to wonder about my own self-serving motivations—and you should! I fully hope to profit from your purchase of this book, and my related speaking, training, and consulting services. But like you, like most professionals, my main motivation is pro-social and I hope to align my enlightened self-interest with my altruism.

I am writing this book because we, the people, need you, the professionals. We need professionals with deep technical expertise. We need your guidance. And we need you to be focused like a laser beam on serving our agenda. So I am writing to share certain lessons I have learned regarding how you can be even more focused on client interests.

Now, I fully appreciate that some of you may resist my diagnosis of the overarching problem. Perhaps I am casting the problem in overly grandiose terms: a conspiracy against the laity! Professionalization triumphing over professionalism!

Perhaps I am casting myself in too messianic a role: I can save you from professional-centeredness!

You may be right. In that case, you can read this book simply as a manifesto for continuous improvement. I believe you will find valuable tools and techniques for incremental improvement, and I hope that is sufficient reason to invest your money and time in this book, and in my other products and services.

Either way, I can help you in this quest for client-centeredness because I am an outsider working on the inside, a non-physician (systems engineer) working with health care professionals, a patient advocate running a patient support program in a large medical center. Because the dynamics are so similar across professions, I think you will find that the lessons I have learned are relevant to any professional practice.

DEAL! Target Audience (Belkora)

I got my start in my primary field of patient advocacy as a graduate student, 24 years of age, volunteering in a resource center for women newly diagnosed with breast cancer. One of the other volunteers said to me, “Jeff, we don’t know what to make of you. You have four strikes against you. You’re young. You’re male. You’ve never had breast cancer. And you’re an engineer. And we can’t agree on which is the worst thing!”

Well, twenty years down the road, I’m down to three strikes. And I hope that even after this inflammatory quotation from Shaw, and this prefatory polemic, my audience still includes the professionals listed alphabetically below. Am I missing any? You make for strange bedfellows when presented together in this way. But you share a common mission: guiding clients to good decisions.

- Advisors, agents, and architects
- Bankers and brokers
- Coaches, consultants, and counselors
- Doctors and designers
- Engineers and emergency responders
- Lawyers and librarians
- Managers and ministers
- Nurses and negotiators
- Salespeople and social workers
- Teachers and therapists

Welcome to the new DEAL!

Join the movement for continuous improvement!

Guide your clients to good decisions!

Read on!