



Extending Your Influence: Engage to Transform

with Charlene Li, Founder and CEO, the Altimeter Group, Author, *The Engaged Leader*

Once you, as a leader, have refined your priorities and listened strategically to your communities, how can you most effectively engage with potential partners within and outside your organization? Especially in large-scale businesses, it's important to make use of tools like Twitter or digital conferencing to find ways of engaging strategically in two-way dialogue. Doing this publicly conveys your openness and responsiveness to the concerns of your audience, and makes a powerful statement about the transparency of your business.

Engage to Transform

- Participation in a dialogue with a group either as a whole or by proxy.

Lessons Learned from Mark Bertolini, Aetna

- Engage selectively with a problem-solving objective in mind.
- Make a plan outlining how and when you will engage with that stakeholder.
- Be intentional about your reasons for engaging and clear about the outcomes you expect.

There are always risks, of course, when leaders engage one-on-one in a public space. You can mitigate these by being crystal clear about your objectives in choosing to engage with a specific person at a specific time, and by being certain in advance that there's a win-win scenario at the end of it. As the leader of a large organization, it would be impossible for you to try to connect individually with every client, customer, or employee. But by engaging intentionally and selectively you can use small-scale connections to have a large-scale impact.

Mark Bertolini, the CEO of AETNA, did exactly this when he decided to engage on Twitter with a stage 4 cancer patient whose coverage had run out. A frustrated AETNA client, he was publicly attacking Mark on the social media network until Mark decided to respond. He engaged the client in dialogue, publicly expressing his understanding and willingness to work on the issue.

At some point, Mark crossed a line, erring by offering too much information publicly about what was and was not AETNA's responsibility in the case. Realizing this, and before too much damage was done, he took the conversation offline, asking the client (publicly) to connect by phone.

Although he may have overshared a bit, Mark engaged with this client strategically, fully aware of the likely outcomes. He knew that this was a case AETNA could help with, and he understood that by engaging publicly in this way, he wasn't necessarily establishing the precedent that he, personally, would handle all customer complaints going forward. Rather, he was representing

AETNA as an insurance company willing to listen and respond to its clients' needs—putting a human face on his business in an industry often criticized for inhumane practices.

Prepare

Before you watch the video

Recall a situation in which you intentionally engaged publicly, one-on-one with a member of your staff or with a customer. What effect did this public/personal engagement have on the rest of the community in which it happened?

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Practice

After you watch the video

What are some of the disadvantages of PR or customer service as the sole points of engagement between your business and the customer?

Are you active on Twitter or other social media? What are some of the advantages, as well as the perils, of being active on social media as a business leader?

What public forum(s) might be the best places for you to connect one-on-one with stakeholders in order to achieve any of your priorities as a leader?
