Developing a Leadership Team

Maureen Waddle, MBA
Elizabeth Holloway, COE, PHR, CPSS
BSM Consulting

Financial Disclosure

We have the following financial interests or relationships to disclose:
BSM Consulting – C
BSM Consulting provides practice management solutions to specialty care providers.

Course Objective

Our goal is to help you identify and develop your leadership team.
Course Objective

Why?

We're pretty sure you can't do this alone.

HELP!!

Step #1: Identify Leaders
Top Traits to Identify Leaders

Personal Competence
- Self-awareness
- Emotional Self-awareness
- Social awareness
- Emotional Intelligence

Self-Management
- Emotional self-control
- Stress tolerance
- Confidence
- Optimism

Regulation
- Emotional Resilience
- Self-belief
- Willingness to Adapt
- Ability to Be Flexible
- Sense of Humor
Leadership Skill Assessment Tools

<table>
<thead>
<tr>
<th>Statement</th>
<th>Not at All</th>
<th>Rarely</th>
<th>Some Times</th>
<th>Often</th>
<th>Very Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. When assigning tasks, I consider people’s skills and interests.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I doubt myself and my ability to succeed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I expect nothing less than top-notch results from people.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I expect my people to work harder than I do.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. When someone is upset, I try to understand how he or she is feeling.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. When circumstances change, I can struggle to know what to do.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Regularly Evaluate Leadership Potential

Step #2

Train   People development   Empower

Educate Reward
### Develop Training Plan

#### Table: Training Plan

<table>
<thead>
<tr>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required for all managers to attend, especially when promoting from within!</td>
<td></td>
</tr>
</tbody>
</table>

#### Facilitate Change with Staff

Especially when promoting from within!

#### Train

**The Five-Step Management System**

1. Management Step 1: Provide the Tools
2. Management Step 2: Provide Training
3. Management Step 3: Help Employees Set Goals
4. Management Step 4: Become a Resource
5. Management Step 5: Hold Employees Accountable
As a future leader in our practice, I am responsible for my professional growth and development.
On the Job Training

T A S K F O R C E

Practice Expectations

Policies
Procedure

Where do you set the bar?

Superstars
Middle Stars
Falling Stars
Where do you set the bar?

- Superstars
- Middle Stars
- Falling Stars

Assign Process Improvement

- How can we make it better?

Managing Up, Down, and Across
Writing Tips

- Few Words
- Bullet Points
- One subject
- Specific instruction
- Use graphs, data to illustrate a point

Set Goals

Develop an Action Plan

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Responsible Person(s)</th>
<th>Due Date</th>
<th>Completion Date</th>
<th>Status/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make the decision to move to proportional scheduling; obtain approval from physicians to move forward</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review patient schedule with administrator and determine how change would impact patients who are already scheduled</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify if any block schedules are needed for your op, cardiac cath, or exams that need testing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work out technician flow, additional time needed, payroll, and project schedule with verwant and associates</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have conference call to introduce concept to staff; get everyone excited and committed to making new schedule work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Coaching Others

- **Demonstrate**
- **Teach**
- **Practice the Techniques**

Role Play

Coaching Others

- **Praise**
  - Actively look for people doing it right
  - Provide praise (even better if others are observing)
  - Ask the person to do more of the same

Coaching Others

- **Corrective Feedback**
  - Focus on the performance, *not* the individual
  - Ask the person, “How do you think that went?”
  - Ask the person for suggestions for improvement
  - Gain commitment for next steps
Empower

Get out of the way!

Reward

- Find out what motivates your managers
- Ensure salary and compensation benefits match duties / work load

Rewards for the Practice

Rewards for you.
In Conclusion – Make It Happen!

- Identify the next generation of practice leaders
- Craft the training plan for leadership development
- Provide training resources and tools
- Provide the opportunity to manage
- Share in ownership of growth and development

Thank You!

Maureen Waddle
mwaddle@bsmconsulting.com

Elizabeth Holloway
eholloway@bsmconsulting.com