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You're Doing Great!
Now Manage People

Leadership Lessons based on Monday Morning Leadership

Presented by:
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Objectives

- Identify and implement steps to become a leader
- Prioritize projects from a leadership perspective
- Identify team members and coach a productive team
- Understand techniques to provide effective feedback
- Share ideas to stay out of "management land" and continue learning

What is Leadership?

The Transition

The skillful use of resources combined with the inspiration of people to achieve results.

Employee → Manager
Manager → Leader

Monday Morning Leadership

Drivers and Passengers

BE A DRIVER:

- Until you accept total responsibility - no matter what - you will not be able to put plans in place to accomplish your goals
- Transitioning from manager to leader requires that you make different decisions
Keep the Main Thing, the Main Thing

- Good to Great, the “Hedgehog Concept”
- What are you passionate about?
- What can you do better than anyone else?
- What are your key economic drivers?

Monday Morning Leadership
2 to 4 “missions” for your company/department
- Equip our employees with the tools to be successful
- Provide outstanding service to our customers
- Make a profit

The Main Thing

What are some “main thing” statements that might work for your practice?

How to inculcate this to create a culture:
- Daily huddle
- Include at bottom of emails
- When reviewing task lists
- When helping staff to prioritize
- Eliminating the non-fit items

Create a Team: Identify and Cultivate Talent

Where do you set the bar?

Superstars
Middle Stars
Falling Stars

Where do you set the bar?

Superstars
Middle Stars
Falling Stars
Steps to Creating a Team

1. Eliminate confusion
2. Hire right
3. Provide training and support
4. Reward the superstars
5. Dehire the falling stars

Step 1: Eliminate Confusion

Foundational Elements of the Practice
- Vision
- Mission
- Values

Define Expectations
- Job descriptions
- Clear procedures

Step 2: Hire Right

Best Demonstrated Practices:
- Review and update job descriptions before hiring
- Know company core values
- Update characteristics and skills necessary for success in the position
- Follow a process that includes:
  - Asking behavior questions related to the job
  - Use relevant test
  - Include observation day
  - DON’T RUSH IT

Step 3: Provide Training & Support

- Written training and competency “check-off” for initial training
- Use of training videos, online courses, and tests
- Create training and “career plans/paths”
- Consider continuing education allowance
- Provide encouragement and reward staff members who actively seek training and self-improvement

Sample: Training and Performance Reviews Based on Competencies

<table>
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<tr>
<th>KNOWLEDGE, SKILLS, ABILITIES</th>
<th>1</th>
<th>2</th>
<th>3</th>
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<tr>
<td>PROFILE</td>
<td></td>
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<tr>
<td>Answers all incoming calls and route to appropriate personnel</td>
<td>✔️</td>
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<td>Check voicemails, route messages, and provide accurate messaging documentation</td>
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<tr>
<td>Ability to triage calls, identify emergency/non-emergency, and schedule appropriately</td>
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<tr>
<td>OTHER</td>
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<tr>
<td>Update patient information from registration forms</td>
<td>✔️</td>
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<tr>
<td>Contact patient to obtain missing information on registration forms</td>
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<tr>
<td>AUTHORIZATIONS AND REFERRALS</td>
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<tr>
<td>Familiar with CPT, ICD 9 codes and can read clinical information</td>
<td>✔️</td>
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<tr>
<td>Ability to train and support staff</td>
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<tr>
<td>CROSS TRAINED IN</td>
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<tr>
<td>Crossed trained in billing and collections</td>
<td>✔️</td>
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<tr>
<td>Act as mentor/trainer</td>
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</tbody>
</table>
**Best Practices:**

**Step 4: Reward Superstars**

Best Practices:
- **Direct**
- **Instructive**
- **Results Oriented**

"Tell them what they did right. Tell them what to do next."

**Step 5: Dehire Falling Stars**

Best Demonstrated Practices:
- Clear feedback from the beginning (no surprises)
- Verify staff member’s understanding
- Show compassion and respect
- CONSISTENCY

Provide Feedback

Feedback

- **Situation**
- **Behavior**
- **Impact**

Focus on the problem, not the individual.
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

Continue Learning and Stay Out of “Management Land”

Do the Right Thing

Guard your integrity.
It’s your most precious management possession.

What is “Management Land”?

- Status Quo
- “LOL” Lack of Listening
- Stuck firefighting instead of “planning”
Getting Out of “Management Land”

- Listen (up, across, and down)
- Remember “The Main Thing”
- Continue to raise the “superstars”
- Superstars to pass on their learning and experience
- Create new superstars
- Do less or work faster
- Raise your own bar

Tips for Working More Efficiently

- Paper “TAR”: Toss, Act, Reading pile
- Uninterrupted planning time EVERY day!
- Reports: if it’s not important enough to read, get rid of it
- Clean your desk
- Control email
- Batch activities
- Eat early or late (avoiding the crowd saves time)
- Manage interruptions
- Run efficient meetings

Efficient Meetings

- Keep meetings short
- Eliminate “perpetual meeting” schedule
  - If the meeting is not necessary, eliminate
- Most important items first
- Don’t recap for latecomers
  - Rewards tardiness, punishes the timely
- Start and end on time
- Leave time at end to recap all actions and assignments

Tips for Managing Interruptions

- Track who and why for interruptions
- Keep the interruption short
  - Stand up
- Do not face traffic
- Schedule one-on-one sessions (up and down) regularly
- Ask, “What do I do that wastes your time and hinders your performance?”

The Learning Zone

- Get out of your comfort zone
- Read 10 minutes a day
- Listen to people
- Give back
- Set goals
- Stay positive

References

- Monday Morning Leadership
  by David Cottrell
- Good to Great
  by Jim Collins
- 78 Important Questions Every Leader Should Ask and Answer
  by Chris Clarke-Epstein
- QBQ! The Question Behind the Question – What to Really Ask Yourself to Eliminate Blame, Complaining, and Procrastination
  by John Miller
- How Full is Your Bucket?
  by Tom Rath & Donald Clifton
Summary

- Leadership requires different thinking
- People rise to the level of expectations: Where are you setting your bar?
- Consistent, quality feedback is the most critical tool a leader has (apart from demonstrating behaviors)
- Learn and teach

Thank you... Now teach someone else!

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