Developing a Leadership Team

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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.

Why?
We’re pretty sure you can’t do this alone.

Session Objectives

- Identify the next generation of practice leaders
- Craft the training plan for leadership development
- Provide training resources and tools
- Provide the opportunity to manage
- Empower and reward their growth and development

Step #1: Identify Leaders
Top Traits to Identify Leaders

Ability to be Resilient
Leadership Skill Assessment Tools

<table>
<thead>
<tr>
<th>Statements to Answer</th>
<th>Not at All</th>
<th>Rarely</th>
<th>Sometimes</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>
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<tr>
<td>2. I doubt myself and my ability to succeed.</td>
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<tr>
<td>3. I expect nothing less than top-notch results from people.</td>
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<td>4. I expect my people to work harder than I do.</td>
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<td>5. When someone is upset, I try to understand how he or she is feeling.</td>
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<td>6. When circumstances change, I am struggle to know what to do.</td>
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</tbody>
</table>

Regularly Evaluate Leadership Potential

Step 2: Craft a Training Plan

Classroom Setting

Online Courses

Books
**Develop Training Plan**

<table>
<thead>
<tr>
<th>Description</th>
<th>Completed by</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read the following articles:</td>
<td>Pete 5</td>
<td>Copies of articles provided</td>
</tr>
<tr>
<td>- Increasing The Productivity Questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- New Administration Regulations for Employee</td>
<td></td>
<td></td>
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<tr>
<td>- Skills and How to Afford Small Business</td>
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<tr>
<td>Study policy manual with less than questions after each task and the following topics:</td>
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<td>- 501 2001</td>
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<tr>
<td>- Practice holiday and hours</td>
<td></td>
<td></td>
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<tr>
<td>- Employer policy</td>
<td></td>
<td></td>
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<tr>
<td>- Employment</td>
<td></td>
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<tr>
<td>- Professional development</td>
<td></td>
<td></td>
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<tr>
<td>- Motor vehicle and vehicle</td>
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<tr>
<td>- Social development</td>
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<td></td>
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<tr>
<td>- CLEP, TASC, and COMPASS</td>
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<tr>
<td>Additional training/development is at risk/Technical training</td>
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</tbody>
</table>

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**Set Goals**

**Goal Setting**

- Specific
- Measurable
- Achievable
- Realistic
- Time

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**Personal Accountability**

“As a future leader in our practice, I am responsible for my professional growth and development.”
Step #3: Provide Training Resources

Train

The Five-Step Management System

Management Step 1: Provide the Tools
Management Step 2: Provide Training
Management Step 3: Help Employees Set Goals
Management Step 4: Become a Resource
Management Step 5: Hold Employees Accountable

Educate

It's Okay to Be the Boss

QBQ!

Flipping the Switch
ASOA Learning Center

Welcome to the ASOA Learning Center!

If this is your first visit to the site, click on the links below to learn more about the key features.

Step #4: Provide the Opportunity

On the Job Training

Task Force
Develop an Action Plan

<table>
<thead>
<tr>
<th>Action Items</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>
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<tr>
<td>Review patient schedule with administrator and determine how change would impact patients who are already booked</td>
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<tr>
<td>Identify if any block schedules are needed for post-ops, cataract evals, or exams that need testing</td>
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<tr>
<td>Work out technician flow, additional hires, payroll requirements, and project schedule with administrator and physicians</td>
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<tr>
<td>Have conference call to introduce concept to staff; get everyone excited and committed to making new schedule work</td>
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</tbody>
</table>

Facilitate Change with Staff

Especially when promoting from within!

Practice Expectations

Policies

Procedure
Managing Up, Down, and Across

Writing Tips
- State purpose and expected response up front
- Few words
- Bullet points
- One subject
- Specific instruction
- Use graphs, data to illustrate a point

The Art of Feedback & Coaching
Focus on the problem, not the individual.

Feedback

<table>
<thead>
<tr>
<th>S</th>
<th>B</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation</td>
<td>Behavior</td>
<td>Impact</td>
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</tbody>
</table>

Focus on the problem, not the individual.

Coaching Others

- Demonstrate
- Teach
- Practice the Techniques
  - Role Play

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

Step #5: Empower & Reward

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.

Train

Educate

Empower

People development

Reward
Thank You!

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