Why Change

- Crisis
- Performance gaps
- New technology
- New opportunities
- Internal & external pressure
- Mergers & acquisitions
- Change for the sake of change
- Sounds good
- Planned abandonment
Translation

Fix something broken
Make something better
Achieve something great

The Price of Failure

E.F. Hutton
Kodak
Woolworth
Sears/Kmart
Change Success

![Pie chart showing change success and failure percentages.]

Why We Fail

- Change fatigue
- Lack of skills
- Lack of input
- Failure to plan

Strategy & Katzenbach Center, 2013
Employee Understanding

- Yes: 44%
- No: 56%

Principles of Change Management

- Lead with culture
- Start at top
- Include every layer
- Make rational & emotional cases together
- Act your way into new thinking
- Engage
- Lead outside the lines
- Leverage formal solutions
- Leverage internal solutions
- Assess & adapt
Practical Steps to Change

Rearrange the office/structure
- New relationships
- New ideas
- New collaborations

Push people
- Move outside comfort zone
- Education & training
- Explain

Controversial questions
- Address unspoken issues
- Identify barriers
- Be assertive

Ask employees
- Happy
- Unhappy
- Outside their scope

Top Six Leadership Challenges

Managerial effectiveness
- Time management
- Prioritization
- Strategic decisions

Inspiring others
- Employees are satisfied
- Employees are working smarter

Developing employees
- Staff development
- Mentoring
- Coaching

Leading a team
- Team building
- Team management
- Providing support

Guiding change
- Overcoming resistance
- Managing employee reactions

Managing stakeholders
- Relationships
- Politics
- Image
Develop Managerial Effectiveness

Set goals
- Specific
- Measurable
- Attainable
- Realistic
- Timed

Delegate
- Understand your preferences
- Know your people
- Be clear about purpose
- Assess & reward

Maximize your value
- Focus on things only you can do
- Prioritize
- Delegate everything else

Role clarity
- Primary responsibilities
- Secondary responsibilities
- Learn to say no

Strategic Planning
What is Strategic Planning?

- Understanding the key issues facing the group
  - Internal
  - External
- Defining the mission of the group
  - Why the group exists
- Setting objectives
  - Where it wants to go
- Mapping strategies to meet those objectives
  - How it plans to get there

Why Plan?

- Group needs to identify itself
- Members need to buy into group
- Group needs to understand how to allocate resources
- Group does not know where it is going without planning
- Directs activities for the coming period
Questions to Answer

- Who we are
- What is happening in our area
- What do we want to do
- How will we get there

Governance

Do you have effective organizational governance?

Yes

You can move forward with strategic planning

No

- Build a governance model first
- Do not waste your time
Do You Have GDS?

- Cannot make timely decisions, or not at all
- Members do not adhere or support group decisions
- Meetings are chaotic & ineffective

Governance Disorder Syndrome

Latham, W. L. "Herding Cats". www.mgma.org

Who Does What

- Physicians - Mission, Vision & Values
- Physicians & Management - Strategy & Goals
- Management - Tactics, Objectives, Structure, Manage
- Physicians, Management & Staff - Execution
Organizational Culture

- Mission and core values influence strategic direction of the organization
- Mission statements ask these questions:
  - Who
  - What
  - Why
  - Where
  - When
  - How
- Core values
  - Define behavior
  - Establish consequences

What Is A Mission Statement

- Concise statement of group’s purpose and reason for being
- Sets boundaries on planning
- What it intends to do
- Whom it intends to benefit
- How it intends to function as an entity

Our mission is to provide high-quality urological care with respect and dignity to patients in Timbucktoo and surrounding area.

A healing healthcare team committed to the provision of quality care that is patient-centered and community-involved.
Mission Statement Key Questions

- Who does the group wish to serve? Patients, geographic area, etc.
- What “customer” needs does the group need to satisfy?
- What physician & employee needs does the group need to satisfy?
- What are the core values of the group?
- What does the group intend to become?

What Are Core Values?

- Govern personal relationships
- Guide business processes
- Clarify who we are
- Articulate what we stand for
- Help explain why we do business the way we do
- Guide us in making decisions
- Underpin the whole organization
- Are not operating practices
- Are not business strategies
- Are not competencies
- Are not changed in response to environment

The organization’s essential and enduring tenets
A small set of general guiding principles
Not to be confused with goals or policies
Not to be compromised for financial or short-term expediency
Collins & Porras - *Built To Last*
Sample Core Values

- Healing patients
- Humility
- Respect for patients, staff & partners
- Happy work environment
- Work as a team
- Life outside the practice
- Serve as role models

Getting Retreat Ready
Items to Cover

1. Facilitator
2. Setting
3. What to cover
4. Prepare
5. Schedule
6. Action plan
7. Use the plan

Can the Manager Be the Facilitator?

Yes
- Biased perspective
- Has to worry about fallout
- Knows the group
- Free

No
- Easily lose control
- May not elicit new points of view
Choosing a Facilitator

- Understands the planning process
- Understands group practice
- Understands physicians
- Understands current healthcare environment
- Can ask hard questions
- Can keep things moving
- Can bring about decisions – not consensus
- Can facilitate follow-up if needed

Setting

- Avoid the office especially during business hours
- Open layout
  - Encourages conversation
  - Facilitates eye to eye contact
- Consider the tone
  - Day trip or overnight
  - Spouses or significant others
- No alcohol during day
Consider the Venue Carefully

What to Cover

Initial retreat
- Governance
- Mission
- Core Values
- Strategic issues
- Goals

Follow-up retreats
- Review basics
- Strategic issues
- Goals
Step by Step

Core Values & Mission statement

Environment analysis

Develop goals

Internal assessment

Develop action plan

Preparing

Budget & dates

3-6 months

Secure venue

Schedule any outside activities

Decide who will attend

Facilitator

Meet with lead physician & Practice Executive

Determine tone & successful outcomes

Finalize agenda

Define any follow-up activities

Survey

Prepare & test

Conduct 4-6 weeks in advance

Study survey data

Print materials

Agenda

Survey results

Financial or operations reports/assessment

Assemble resources

Flip charts

Markers

Projector

Assign scribe
Lay the Ground Rules

- Everyone has a unique perspective & voice & is expected to use it
- No irrelevant thoughts or comments
- No one person has all the information
- Improvement is a process
- Establish a “parking lot”

Action Plan

- What will be done?
- Who will do it?
- What will it cost?
- What is the benefit?
- When will it be completed?
SMART Goals

Specific
- Simple
- Sensible
- Significant

Measureable
- Meaningful
- Motivating

Achievable
- Agreed
- Attainable

Relevant
- Reasonable
- Realistic & resources
- Results based

Time bound
- Time based
- Time/cost limited
- Timely

Action Plan Report

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<tr>
<th>Goal</th>
<th>Goal Lead</th>
<th>Committee</th>
<th>Budget</th>
<th>Report Date</th>
<th>Status Updates</th>
<th>Complete Date</th>
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<tr>
<td>Purchase new EMR</td>
<td>Suzy Dr. Smith</td>
<td>Practice executive Physician Billing rep Nursing rep Receptionist rep IT rep</td>
<td>$250,000</td>
<td>Monthly</td>
<td></td>
<td>January 1, 2018</td>
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<td>Research renovation or purchase new building</td>
<td>Suzy Dr. Jones</td>
<td>Practice executive Physician Billing rep Nursing rep Receptionist rep</td>
<td>TBD</td>
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<td>September 2018</td>
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<td>Redesign intake process</td>
<td>Suzy</td>
<td>Practice executive Physician Receptionist rep Billing rep</td>
<td>&lt;$10,000</td>
<td>August 2017</td>
<td>October 2017</td>
<td></td>
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</tbody>
</table>
Using the Plan

Everyone knows where he or she fits in the plan
Act only on things in the plan
Follow the plan
Report at every leadership meeting

Start a file for the next retreat

Eliminate Excuses

- We cannot predict the future!
- It is expensive and time consuming!
- Too many current problems: we do not need anything new!
- I am not giving up my weekend!
- Who is going to take call?
- It is just a waste of time dreamed up by consultants to make money!
Takeaways

- Demonstrate the problem
- Form a supportive team
- Over communicate

- Emphasize what stays the same
- Believe naysayers
- Highlight early wins

Questions

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