Physician Leaders Engaging Physicians to Lead:

*Keys to Success from the C-Suite to the Clinical Front Line*

AHA Physician Leadership Forum Webinar Series

February 20, 2014
2:30-3:30 pm EST
Dr. Stephen Beeson is a board-certified family medicine physician, nationally recognized speaker, author, and physician leadership tool developer. Dr. Beeson has provided tools and tactics for engaging and training physicians for hundreds of medical groups and hospitals throughout the country. He recently founded The Physician Effectiveness Project at PracticingExcellence.com, a technology based physician skill-building and learning platform, launching February 2014.


Tracy Duberman, Ph.D. is an executive coach, organizational development consultant, business owner, frequent keynote speaker, Board member of the Physician Coaching Institute, and a Fellow of the American College of Healthcare Executives.

With a background combining business experience with innovative research on healthcare/physician leadership effectiveness, Tracy founded The Leadership Development Group, Inc. a firm devoted to developing healthcare leaders and physician executives. TLD Group works with leaders to improve performance through educational workshops, tailored on-site leadership development programs, and tailored individual coaching for physician and healthcare leaders.
Learning Objectives

- Gain knowledge of leadership competencies of highly effective physicians.

- Examine a roadmap for engaging all physicians as leaders – from the C-suite to the clinical front line.

- Learn a two-step, top-down/bottom-up approach to promote leadership development and activate clinicians using a combination of engagement modalities.
Agenda

- Setting the Stage
- Roadmap to Engage Physicians to Lead
- Examples of Successful Tactics
- Q&A
Setting the Stage
The Vision: True “Systemness”
Physician Leadership is Critical to Physician Engagement and Embracing Change

- Physician engagement will predict organization culture and performance
- Physician leader skills are CRITICAL to executing engagement
- SKILLS to lead, enroll and engage can be learned
Physician Leaders Lead When:

- They can activate their colleagues to lead a clinical micro-system
- They define, embrace and support the physician role as team leader
- When we figure how physicians go from “I have to get my stuff” TO “I understand my role to lead others to a place I want to go”
A Roadmap for Engaging Physicians to Lead and Serve as Change Agents
Roadmap for Developing and Engaging Physicians

1. Prime the Organization
2. Define Leadership
3. Conduct Assessments
4. Design
5. Deliver
6. Measure
7. Sustain
1. Prime the Organization

- Develop an organizational physician integration strategy for the future
- Obtain buy-in and commitment from CEO, senior executives and physician leadership
- Determine the physician leader target population
- Identify physician champions to activate clinical front-line
- Establish physician leadership steering committee and design team
- Establish an engagement and communication plan
2. Define Physician Leadership

**Physician Leadership Effectiveness**

- **Leading Self**
  - Self Awareness
  - Self Management
  - Self Development

- **Leading Others**
  - Build Effective Teams
  - Communicating & Inspiring

- **Leading Change**
  - Resiliency
  - Courage & Authenticity
  - Change Management

- **Leading for Results**
  - Decisiveness
  - Systems Thinking
  - Business Acumen
3. Conduct Assessments

Organizational Assessment

APLA Organizational Priority Interview Guide

Introduction:
- **Background**
  - Provide background on APLA, Action Learning, and reason for interview
- **Purpose of the Interview**
  - Obtain insights on Health System priorities and needs
  - Provide summary of assessment and aggregate view based on interview learnings
  - Findings will be used to identify action learning projects for APLA leadership development program
- **Interview approach**
  - Semi-structured format
  - Note-taking
  - Confidential – quotations are used but not attributable
  - Approximately 1 hour time contract

Leadership Assessments

MSCEIT
Mayer-Salovey-Caruso Emotional Intelligence Test™

The Hogan Guide

HCAHPS
Hospital Consumer Assessment of Healthcare Providers and Systems

Press Ganey®
4. Design Approach

- **Step One:** Engage the formal leaders through alignment to the overall health system strategy

- **Step Two:** Provide tools to allow physician leaders to engage and activate the medical staff
Step One: Developing Physician Leaders

**Didactic Training:**
Structured training courses focusing on development of leadership skills and competencies

**Action Learning:**
Process to apply learning and develop leadership competencies through work on real business problems

**Assessment & Coaching:**
Mentoring and networking; assessments, coaching and feedback
Sample Multi-Dimensional Program to Engage and Develop Physician Leaders

<table>
<thead>
<tr>
<th>Learning Components</th>
<th>Description</th>
<th>Focus</th>
</tr>
</thead>
</table>
| In-Classroom Didactic Training                          | Lecture series delivered by national experts and TLD Group physician faculty on priorities for change | • Creating high performing clinical care teams  
• Business fundamentals for physician leaders  
• Enhancing physician performance  
• Emotionally intelligent leadership |
| Leadership Assessment, Feedback and Individual Development Planning | Develop specific leadership behaviors for enhanced leadership effectiveness | Leading Self  
  • Self Awareness  
  • Self Management  
  • Self Development  
Leading Others  
  • Building Effective Teams  
  • Communicating & Inspiring  
Leading Change  
  • Resiliency  
  • Courage & Authenticity  
  • Change Management |
| Action Learning                                          | Small groups of physician leaders worked collaboratively with colleagues to derive solutions to strategic / management issues while developing leadership skills | Examples of strategic action learning projects:  
• How do we grow the business?  
• How to reduce utilization while maintaining quality?  
• How physicians can improve patient outcomes?  
• How do physician leaders execute on their roles and responsibilities? |
Step Two:
Physician Leaders - Activate Clinical Front Line

Leaders activating leadership basics:

- Recurrent theme as “Physician as team leader”
- How we show up will make or break the team
- Model leader attributes you want from physician colleagues
Activating Physicians

- Select physician based on leadership capacity
- Use formal and informal communication channels “physician as team leader”
- Physician as leader and influencer can transition from back seat victim to front seat contributor
- Provide them SIMPLE frontline physician development on leading teams
  - Mindset (Our “stance”)
  - Giving and receiving feedback
5. Deliver

- Implement top-down approach, as appropriate
  - Assign individual and team leading and learning “on-the-job” projects
  - Provide individual and team coaching
  - Create and deliver learning modules

- Implement bottom-up approach
  - Provide scalable physician team leading development
  - Investing in physicians to lead and create influence is as good for them as it is for the team
6. Measure

- **Top-Down Approach**
  - Monitor individual and team progress, as appropriate
  - Measure overall impact based upon agreed upon measures of success

- **Bottom-Up Approach**
  - Employee satisfaction
  - Patient satisfaction
  - Harvest rapid feedback loops and BROADCAST!!
7. Sustain

- Establish strategies for sustainability including:
  - Mentorship programs
  - Physician selection, orientation and skill building commitments
  - Code of Conduct
  - Ongoing physician leadership development tracts
Critical Success Factors for Physician Leadership Engagement

- Trust
- Accountability
- Common Purpose and Vision
- Physician Champions
- CEO Support
- Multiple Learning Methods
- Communication Plan
- Engagement Strategy
- Collaborative Culture
- Sustainability
Q&A

Stephen Beeson, MD
Founder, PracticingExcellence.com
Direct: 619.272.2212
stephen@practicingexcellence.com

Tracy Duberman, Ph.D., MPH, FACHE
Founder, The Leadership Development Group
Direct: 973.722.4480
tduberman@tldgroupinc.com