

LEADERSHIP CIRCLE FOR HEALTHCARE

SESSION 5 – Effectively leading through change

February 7, 2020

Review of previous session

- What have you done since the previous session?
 - We shouldn't "should" on ourselves
 - "Comparison is the thief of joy" - Teddy Roosevelt
 - Making better in-person relationships
 - Asking yourself - "Can this message be delivered in-person?"
 - Value conversations
 - Snow globe visual – using the visual as a reminder to calm my mind
 - Trying to be present and mindful amid technology becoming habitual

Introduction to session topic – Effectively leading through change

- According to a McKinsey & Co study in 2017, "change transformation" success rates within organizations are **33%**.
- Change

	2000	2020
Smart Phones	12% of population	66% of population
Facebook	0 users	1.5B users
Kmart	2486 stores #3 US retailer	70 stores left
Amazon	2.8B sales	232B sales
Walmart	\$165B sales	\$521B sales
Banks	8664 Banks	4561 Banks

- Healthcare Changes
 - Coding
 - Electronic
 - Chronic diseases
 - Localizations
 - Consolidation – everybody is buying everybody
 - Pharmaceutical – Amazon serving customers
 - Online – everyone wants the immediate delivery of healthcare
- Change
 - Blockchain
 - Transcend Insights
 - US news
 - Ranking hospitals
 - docdoc
 - Department of health and human services
 - Amazon Echo
- 10 Newer/Expanded roles in Healthcare within the last 10 years

- Chief Diversity Officer
- Chief Experience Officer
- Chief Innovation Officer
- Chief Medical Information Officer and Chief Nursing Informatics Officer
- Chief Pharmacy Officer
- Chief Quality Officer
- Chief Revenue Officer
- Chief of Staff
- Chief Strategy Officer
- Chief Wellness Officer
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- Switch
 - What key points caught your attention?
 - Elephant
 - If it doesn't want to, it doesn't have to
 - Direct the rider
 - + Rational/planner/leader
 - – spin wheels/analysis paralysis
 - Motivate the elephant
 - +emotional/energy/passion
 - -Looking for quick payoff
 - Shape the path
 - Clear the barriers
 - Reinforce barriers
 - Find the culture champions
- Relevant because:
 - Build an organization that is resilient to change
 - So, how do you create a culture that is nimble?
- J-Curve - Jerald M. Jellison, PhD
 - What is happening when the curve is going down?
 - Morale
 - Productivity
 - Financials
 - Peer relationships
 - Friction
 - restructure – lost coworkers
 - Confidence
 - Trust

- How do you be a leader worth following? How do you be a leader amidst this J-curve? How do you communicate well?
 - Stage 1 – Fear, anxiety, anger
 - Why do I have to change?
 - What does this mean for me?
 - Nothing good and a lot of hurt
 - If it is not broken, why change it
 - This is a mistake because
 - I'll never be able to do this
 - Good communication example: Chuck Hyde, former Milestone Leader – “I hope you trust that I will communicate all that I can with you”
- What changes have felt like an off-the-cliff moment?
 - Technology changes
 - Examples -
 - Salesforce and SharePoint
 - “Live” with Epic at Baptist Health
 - Acquisitions and mergers
- Event good change can be stressful
 - Stage 2
 - Imagine the worst
 - Distort reality
 - Dire expectations
 - Anticipation – suspense
 - Say nothing to escape
 - Stage 3 – Failure, panic, escape
 - I told you so
 - I knew this was a mistake
 - I'm doomed
 - It's only going to get worse
 - Stage 4 – Uncertainty, relief
 - At least I'm not failing every time
 - This is just luck
 - I still don't know what I'm doing
 - Maybe I can sort of do this
 - Stage 5 – Joy validation
 - Yes
 - I love it, this is great
 - Why did I wait so long?
- Success through change:
 - Communication, specifically including the “why”
 - Allowed space and acknowledge AND move them through
 - I-school, integration school
 - Address the “What is in it for me?” - what do you do to fill people's needs
 - Clear leadership – corral it

- Look at your assertiveness score on your Birkman – the higher the score, the more you need to know you will be okay
 - Provide assurance where appropriate
 - Manage lead time
- Video – John Pepper, “Act on What You Believe” - What about when you have an opportunity to champion change
 - Tell me what you think – act on what you believe to be true
 - How can I make a difference?
 - Find something you really believe in
 - Learn all you can about it
 - Present it with all of your mind and heart
 - If you have a level of conviction, show it
 - Be prepared to encounter resistance
 - What do you think about
 - Appreciate a leader that has brought their heart and head
 - Just because the idea was shot down the first time, doesn’t mean it is dead
 - Do your homework
 - Have you seen someone champion something through your organization?
 - Same playbook but the implementation process can be different from hospital to hospital. Need champions in Stage 4 and 5 pulling stages 1 and 2 on the curve
- 2-minute recap of the J-Curve
- When Change Works – From the authors of *Switch*
 - Clear Aspirations & Targets
 - Clear stretch targets
 - Track progress
 - Create a clear change structure collaboratively
 - Define initiatives
 - Involve employees early
 - Energy & Commitment throughout the organization
 - Collaborate and build ownership
 - Accentuate the positive and the issues
 - Clear and effective communication
 - Strong Leadership
 - Build leadership capability
 - Focus on mindsets and behaviors
- 2 Dimensions of Change
 - New Job
 - New Boss
 - Reengineering
 - New technology
 - Merger/acquisition
 - New system
 - Revised job

- Personal
- 2 Dimensions of Change
 - Structural event – as noted in previous bullet
 - Psychological response
- Change Style Preferences
 - Conservers
 - Rules & policies provide order and thus have intrinsic value
 - Accept the structure
 - Prefer change that is incremental
 - evolutionary
 - Pragmatists
 - Rules & policies are a fact of life, be selective and prudent
 - Explore the structure
 - Prefer change that is functional
 - situational
 - Originators
 - Rules & policies are the problem and often have negative value
 - Challenge the structure
 - Prefer change that is expansive
 - Revolutionary
- On page 2 – introduction
- Reminder on assessment data
 - Never an excuse
 - Never a weapon
 - Never the whole story
- Perceptions
 - Conservers see originators as
 - Impulsive and unfocused
 - Overlooking or ignoring important details
 - Lacking appreciation for tested ways of getting things done
 - Starting but not finishing projects
 - Not interested in follow through
 - Wanting change for the sake of change
 - Not understanding how things “really” get done
 - Originators see conservers as
 - Dogmatic and bureaucratic
 - Yielding to authority and/or tradition
 - Having their head in the sand

- Supporting the status quo
 - Lost in the “weeds”
 - Lacking new ideas
 - Needing too much direction
- Pragmatists can be seen by strong conservers and originators as
 - Compromising and mediating
 - Indecisive and/or flip-flopping on issues
 - Easily influenced
 - Noncommittal
 - Playing politics
 - Hiding behind their team
- In groups by change style – discussion questions
 - What do you appreciate about other styles?
 - What do you find challenging about other styles?
 - What tips would you offer the other preferences to help you work together more effectively?
- Communicating Change
 - Conservers
 - Know the details
 - Don’t start by presenting the big picture
 - Pick one angle and build from there
 - Present a minimum of information and ask what else is needed
 - Let them guide you with what they need to know
 - Ask about anticipated obstacles
 - Pragmatist
 - Speak in terms of outcomes
 - Talk about the consequences
 - Ask for recommendations
 - Talk about timelines

- Ask whose input is needed
- Originators
 - Think in the future
 - Ask what they would like to see happen
 - Ask for ideas
 - Ask what's effective in the current system (status quo) that they would not want to change
 - Talk about the connection between the change and future effectiveness
 - Give details as they are requested
- Page 10 – read about tips for each style
- Birkman Insights
 - The tool helps us understand behaviors
 - Usual – occurs when needs are met
 - Stress – occurs when needs are not met
 - Components
 - Self-consciousness
 - Assertiveness
 - Do you need a leader that convinces you or assures you through change?
 - Or, do you need a goal and time alone to work on reaching the goal?
 - Insistence
 - Restlessness
 - At your Table
 - Explore your insights from your CSI report and your Birkman reports within your table group
 - How can you apply these insights to your roles as leaders in your organizations?
 - What one action will you each commit to as you strive to be a Leader Worth Following?
- Program Wrap-Up
 - Part of being a leader worth following is understanding what is informing you

- What have you seen in this person over the last 6 months?

Guest Panel

Introductions –

- We've been talking today about leading through change and the importance of leaders understanding both the rational and emotional sides of implementing change. What have you experienced as important success factors when change is implemented well?
 - Changing when things are not going well, you have to get over helplessness. Therefore, leading through change is more than the strategy, but the ability to articulate a vision and help people believe in that vision. Everyone has to feel like they know you when you deliver the change vision.
 - There is the importance of the logical component but you have to have the relational component. You have to communicate the why. You have to accept that people are going to come along at different rates, some fast, slow, or, maybe, never.
- Unfortunately, we know that implementing change can be difficult and doesn't always go as planned. Can you share a story when you've seen change not go as planned and what lessons can be learned from that?
 - Today, people are more expectant of change. The organization felt like they had a compelling reason for change. The buy-in process was watered down and they failed in this area. It is kind of like a diet, you want the result but haven't established the behaviors that will lead to those results on the front end. The process of change – every part is critical.
- The industry is going through many acquisitions and consolidations. Combining organizational cultures might be one of the most difficult changes to navigate. Have any of you experienced this? What has served you well as you have led some of this transformation? What might you have done differently?
 - Baptist has acquired some smaller hospitals and increased the model by about 25%. The change was the people coming into the family. There were lots of emotion on Baptist "coming." The current organizational members are the other side of this and questioning "why are we doing this?" The focus was less on the overhead, financials, etc. And more about the mission and the need in the community. They are candid about the challenges it would bring. acknowledged by saying yes, it is going to add stress and yes, it is going to be a challenge. The focus on the mission helped people get through the emotional piece then came back with the problems.
 - The textbooks say mergers fail because of lack of vision. However, he has seen the leadership was after a single culture for all campuses. Over the course of a decade, the leadership had to figure out how being "one" made sense – standardization of protocols while not impeding on the positive micro cultures.
- We've been talking today about our own styles and our openness to change. Some people tend to rely on the "tried and proven" (Conservers) and others are more open to "paving a new way" (Originators). As you work with people across this spectrum, how do you inspire both groups?
 - Change in the organization has been huge and knowing it is coming through experience has helped. The culture and communication of informing the people of what you are doing has been key. Making sure you are reassuring people that the you (the leader) is with them.

- As you've grown in your career and spent a lot of time working with your organization the business climate continues to get tougher. What advice would you give this group on how to maintain high performance in a stressful environment?
 - There is a fine line of them asking more of their team members than ever before. Organizations are leaner than ever before with financial pressure. At times, we have gone past the point of making it too lean or too much.
 - The first duty of leadership is to inspire. You can do it through many different ways – hard work, subject matter expert, communication. The mission of your organization is critical. You have to make sure your people know that their work matters and do it in such a way that it connects with them. The relational piece matters. Inspire them around the people you serve. Inspiration gives them peace of mind amidst the stress of role to feel better and connect beyond their job.
 - Sometimes we get so focused on what we read about leadership but if you can just get to know someone's name, their family, and build a personal connection it'll make a big difference.
- What is one practical tip that you'd share with this group, in terms of more effectively allocating their time for more strategic initiatives vs. the day to day grind?
 - Pay yourself first – make sure you take care of yourself. Know what those few things are that you want to accomplish to decide what you have to cut out. Make the list of high priorities and make those things first.
 - Stay out of the weeds. It is important to know and understand the organization at a deep level yet don't get down in the weeds.
 - Schedule is important – put time on your schedule that is guided and protected and used towards what is important and is a priority. Take time to reflect and be intentional for the big picture thinking
 - "Head-up time" – time to think about the critical decisions you have to make. It is sacred time to think about what is important.
 - Make sure you have the right people around you.
- Has been easier or harder to manage your time?
 - It changes – there are seasons of it getting bogged down. Then it triggers the need to reevaluate where time needs to be
 - It is not always the grind. You have to be mindful of how you spend your time and it matters how others see you spending your time.
- Functional leaders while also managing people. There is this tension point of managing time appropriately.
 - A lot of this is up to you. Maybe make a case for an assistant. People won't often advocate for you.
 - It forced him to think about the people around him and identifying what they are doing. It actually gave them an opportunity.
 - Delegate, delegate, delegate – your team is important
 - Intentional about not being in the weeds. Advise was to find time to build relationship as well. Find those few minutes to have people share those experiences with you.
- Can you give an example of when you had to implement a change that you weren't comfortable with or weren't excited about?
 - He recognized that there wasn't buy in. Personally, it was tough and it felt like a grind. Questioned why did he pick healthcare, but he stuck with it and kept focus on the big picture. Asked how to communicate the big picture differently and asked how the team

saw it. He started to listen to the group more and was surprised to see the impact of them sharing their input. They started to find solutions together.

- If you don't know the why, seek clarity. Make sure you understand and ask those questions of the leader.
- There were times when he didn't understand the change. Once he found the understanding, the motivation came but it was difficult to implement until finding the understanding.
- Example is the implementation of e