Tools to Represent Your Work as a Leader:

Leader Reports and SMART Goals

JAMIE SILKEY, PA-C, MPAS, MHA, DFAAPA

INTERIM CMIO, ADVANCED PRACTICE ASSOCIATE DIRECTOR

NOVEMBER 17, 2021

EXECUTIVE LEADERSHIP CONFERENCE

Disclosures

1. NONE

Froedtert & Medical College of Wisconsin

Objectives

Identify Key Components of Effective Leader Communication

Learn tools for effective communication and display progress in a concise manner to other leaders

Recognize common pitfalls and challenges in leader communication
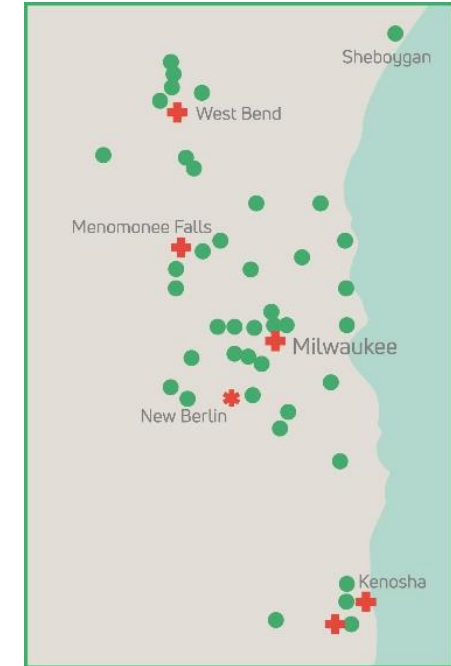
WHO WE ARE

Froedtert & the Medical College of Wisconsin health network:

- Partnership between Froedtert Health and the Medical College of Wisconsin

- Operates eastern Wisconsin's only academic medical center and adult Level I Trauma Center

- Respected research facility with 2,000+ studies each year

WHO WE ARE

The **Medical College of Wisconsin** is located on the Milwaukee Regional Medical Center Campus and has two regional campuses in Wausau and Green Bay

The Froedtert & the Medical College of Wisconsin health network provides care for patients at 5 hospitals and 45+ locations in Southeastern Wisconsin

WHO WE ARE

TOP 5%
NATIONALLY IN NUMBER OF RESIDENTS TRAINED
>900 residents and fellows in training each year

3RD LARGEST PRIVATE MEDICAL SCHOOL IN THE NATION
9TH LARGEST US MEDICAL SCHOOL

TOP 6% worldwide in publishing new knowledge

1,600 PHYSICIANS
650 ADVANCED PRACTICE PROVIDERS

PHYSICIAN PRACTICE GROUP EMPLOYS **MORE WISCONSIN PHYSICIANS** THAN ANY OTHER GROUP IN THE STATE
2.8 MILLION PATIENT VISITS ANNUALLY

MCW PRACTICING PHYSICIANS ACCOUNT FOR **45%** OF WISCONSIN DOCTORS LISTED IN *BEST DOCTORS IN AMERICA*®

Froedtert & MEDICAL COLLEGE of WISCONSIN

ORGANIZATIONAL SUMMARY

Entities

- Medical College Physicians Group (MCP)
- Community Physicians (CP)
- Froedtert Memorial Lutheran Hospital (FMLH)
- Community Hospital Division (CHD)
- Froedtert Health (FH)

Executive committees

- Froedtert Health Board
- MCW Board
- Clinical Executive Committee
- F&MCW Healthcare Value Council (HCVC)

SPHERE OF WORK

AMBULATORY   AMBULATORY SURGERY CENTERS   CANCER CENTERS   CLINICAL INFORMATICS   EMERGENCY DEPARTMENT   INPATIENT

OBSERVATION UNIT   PERIOPERATIVE   PHARMACY   RADIOLOGY   SCHEDULING   URGENT CARE

FROEDTERT HOSPITAL   MCW   ENTERPRISE

FOCUS AREAS

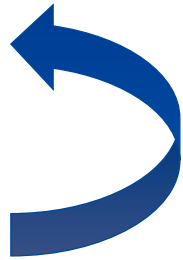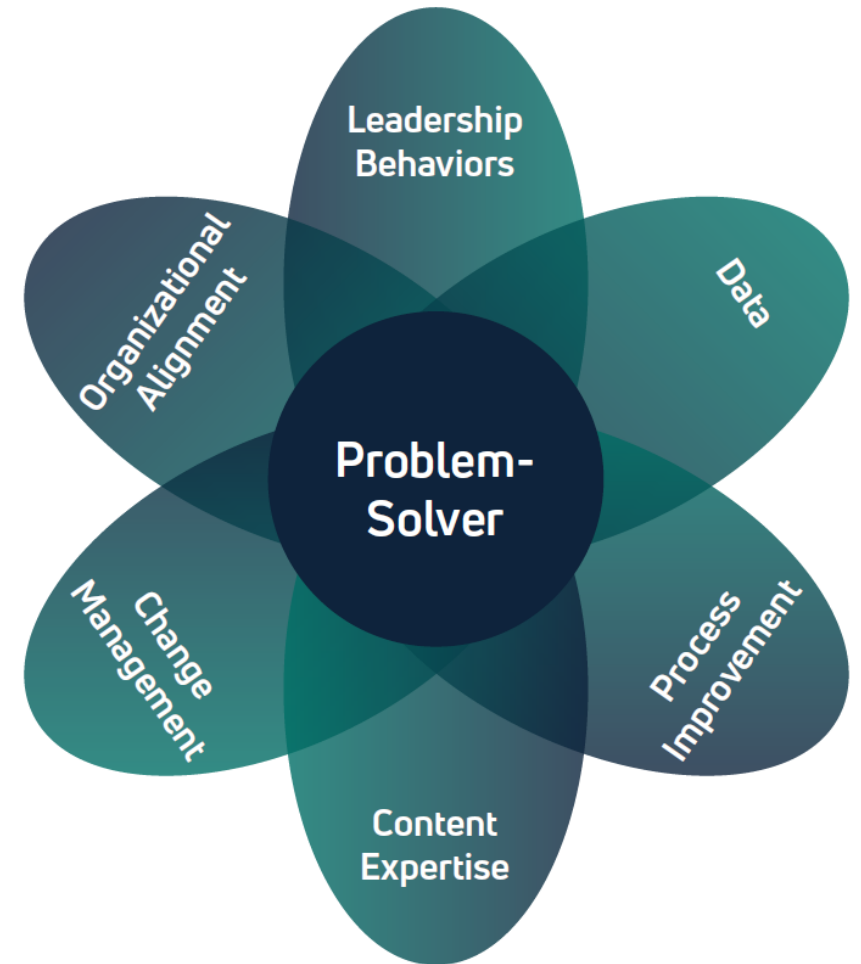|		
Access	Communication	Data
Engagement	Huddles	Idea generation
Length of stay	Operational effectiveness	Operational planning
Patient flow	ROI	Scorecard
Staffing model	Workflow	Visual management

Does Anyone Feel Like This?

Communicating with Leaders

Regardless of methodology, leaders need to:

1. Make decisions
2. Execute
3. Reflect

"Rinse and Repeat"

Key Communication Skills of Leaders

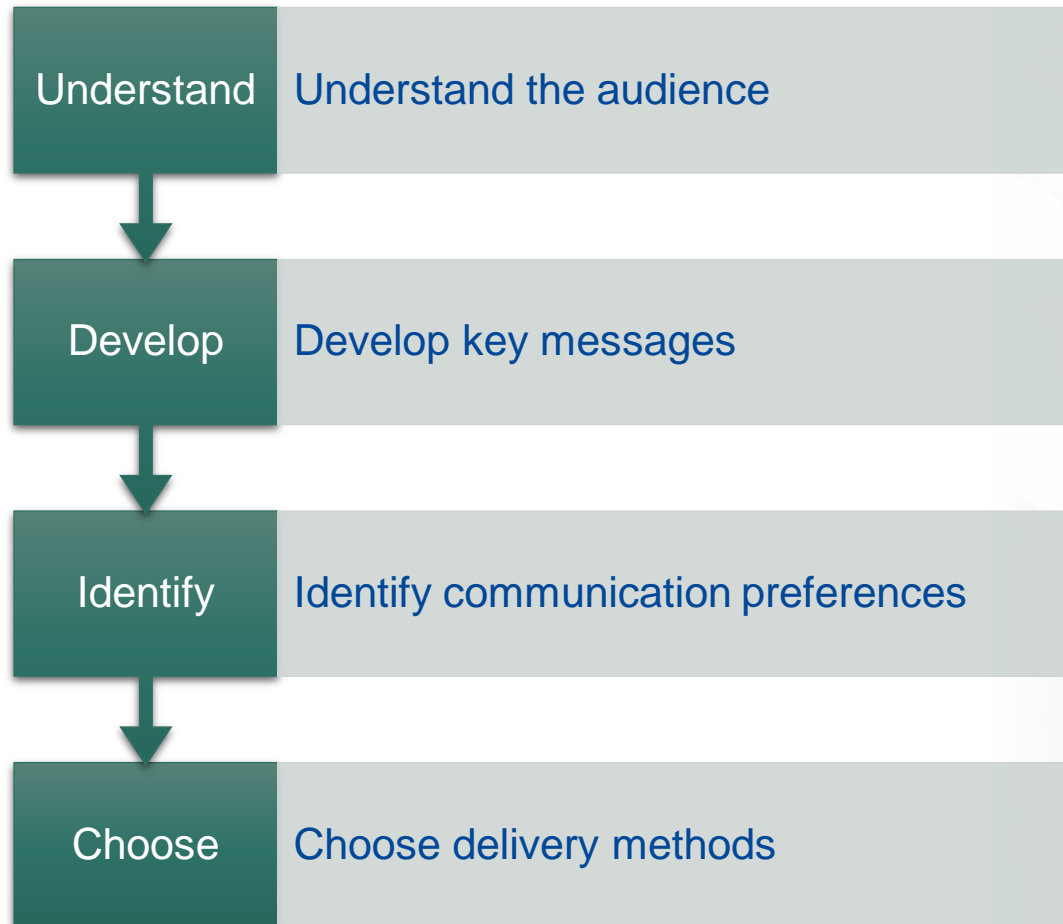| Adapt Your Communication Style	Active Listening	Transparency	Clarity
Ask Open-Ended Questions	Empathy	Open Body Language	Receiving and Implementing Feedback

Froedtert & Medical College of Wisconsin

Components of Leader Communication

Understand	Understand the audience
Develop	Develop key messages
Identify	Identify communication preferences
Choose	Choose delivery methods

Froedtert & MEDICAL COLLEGE of WISCONSIN

Understanding your Audience

Role
(Management System)

Current Understanding or Perspective on Issue

Current Environment (Barriers or Objections)

Froedtert & MEDICAL COLLEGE of WISCONSIN

What is the Audience's Role?

Management System

EXECUTIVE SPONSOR

SPONSOR

CHAMPION

FRONT LINE

MANAGEMENT SYSTEM

- A management system is a purposeful connection between stakeholder groups, which are defined as front-line staff, champions, sponsors, executive sponsors and senior influencers.

- It requires a cadence, structure, reporting tools, as well as each stakeholder group performing their roles.

- Information and data flows up and down the management system through sponsor report outs, project meetings, and huddles.

Executive Sponsor(s)

Sponsor(s)

Senior influencer(s)

Champion(s)

Front line staff
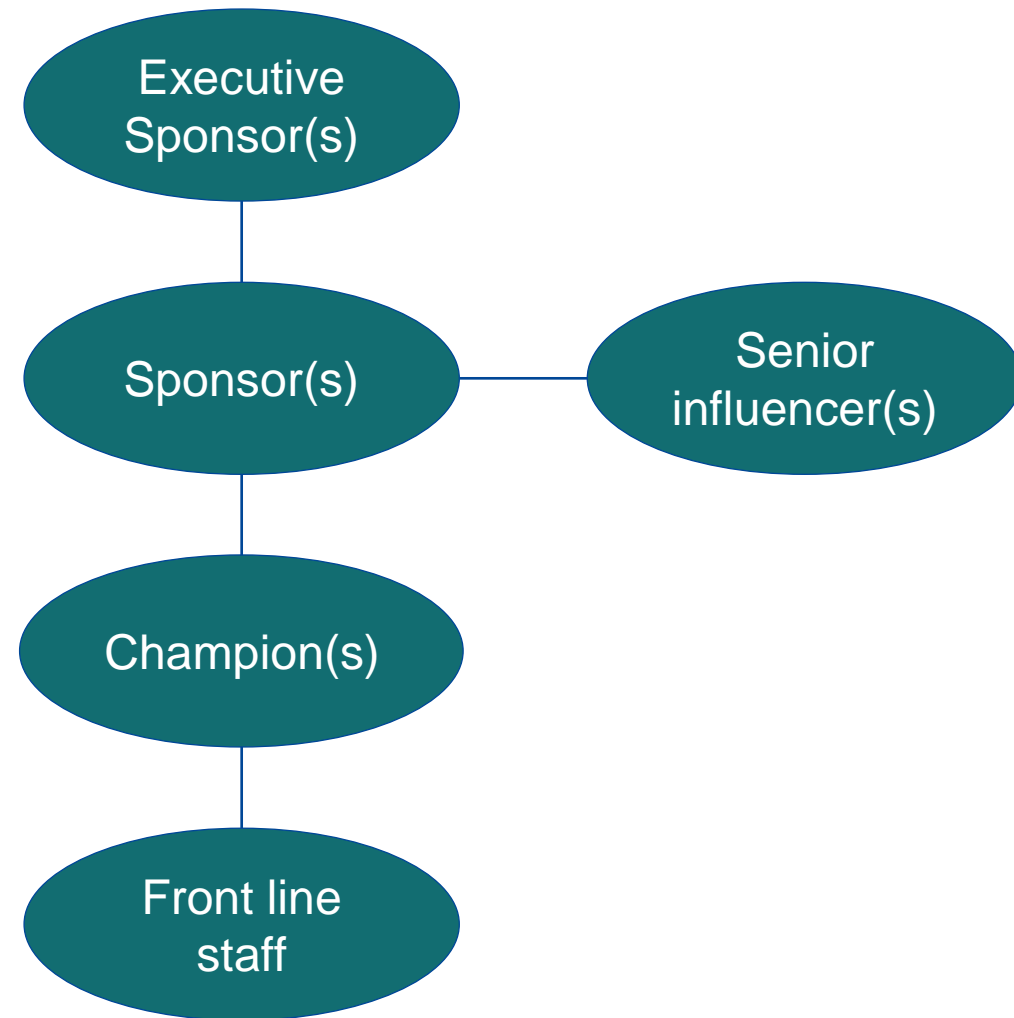
WHAT IS THE ROLE OF A SPONSOR?

Attend meetings at key milestones during the project

Describe how the change will benefit our patients, our staff, and our organization

Actively solicit and remove barriers

Celebrate success, and recognize those who have made significant contributions

What is The Role of A Champion?

Manager/Supervisor

Communicate

- Employees prefer to hear messages about change directly from their manager or supervisor

Advocate

- If the manager opposes the change, chances are the team will too
- Making sure the leader is on board is an important step for the change management team
- The change outcome depends on it

Coach

- Helping employees through their own personal transitions is the essence of change coaching by managers and supervisors
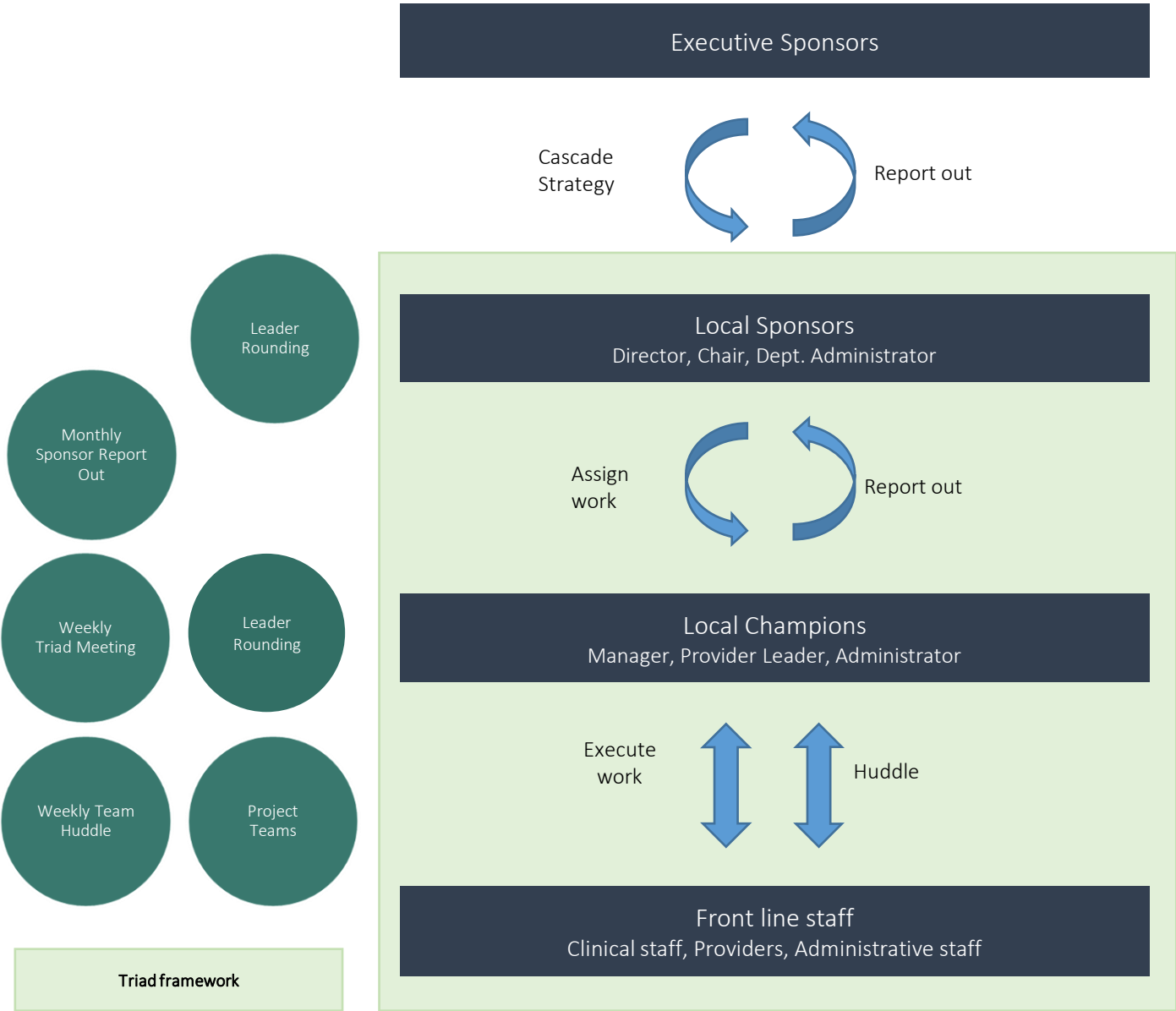
Liaison

- Interaction with the project team, taking direction and providing feedback

Resistance Manager

- Research shows the best intervention for resistance is the manager

Management System Concept

Executive Sponsors
- Determines strategy
- Provides Resources
- Accountability to the timeline
- Celebrates with Team

Sponsor
- Provides Resources
- Removes Barriers
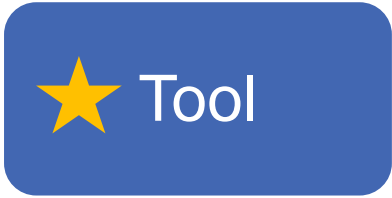- Go to Gemba to learn
- Celebrates with Team

Champion
- Provides Leadership
- Communication
- Resistance Management
- Recognition and Celebration

Front Line Staff
- Team members
- Idea generators
- Problem Solvers
- Customer (patient) contact

Executive Sponsors

Cascade Strategy — Report out

Local Sponsors
Director, Chair, Dept. Administrator

Assign work — Report out

Local Champions
Manager, Provider Leader, Administrator

Execute work — Huddle

Front line staff
Clinical staff, Providers, Administrative staff

Leader Rounding

Monthly Sponsor Report Out

Weekly Triad Meeting

Leader Rounding

Weekly Team Huddle

Project Teams

Triad framework

Mapping Your Management System

⭐ Tool

EMERGENCY DEPARTMENT MANAGEMENT SYSTEM

	Froedtert Hospital	Medical College of Wisconsin
Executive Sponsors	John Ernst VP, Operations	Ian Martin, MD Chair, Emergency Medicine Steve Camp Department Administrator
Sponsors	Patrick McNally Executive Director	John Ray, MD Senior Medical Director
Champions	Dina Derocher Sarah Jasti Nursing Managers Tina Nielson CNS	Jamie Aranda, MD Matt Chinn, MD Nancy Jacobson, MD Medical Directors
Front Line Staff	Nurse Tech Health Unit Coordinator Social Worker Case Manager	Attending Fellow Resident Nurse Practioner Physician Assistant Administrative

Froedtert & MEDICAL COLLEGE of WISCONSIN

GUIDING PRINCIPLES

A successful management system is the foundation

Alignment to strategic priorities and measures

Develop and assess the effectiveness of each level of the management system
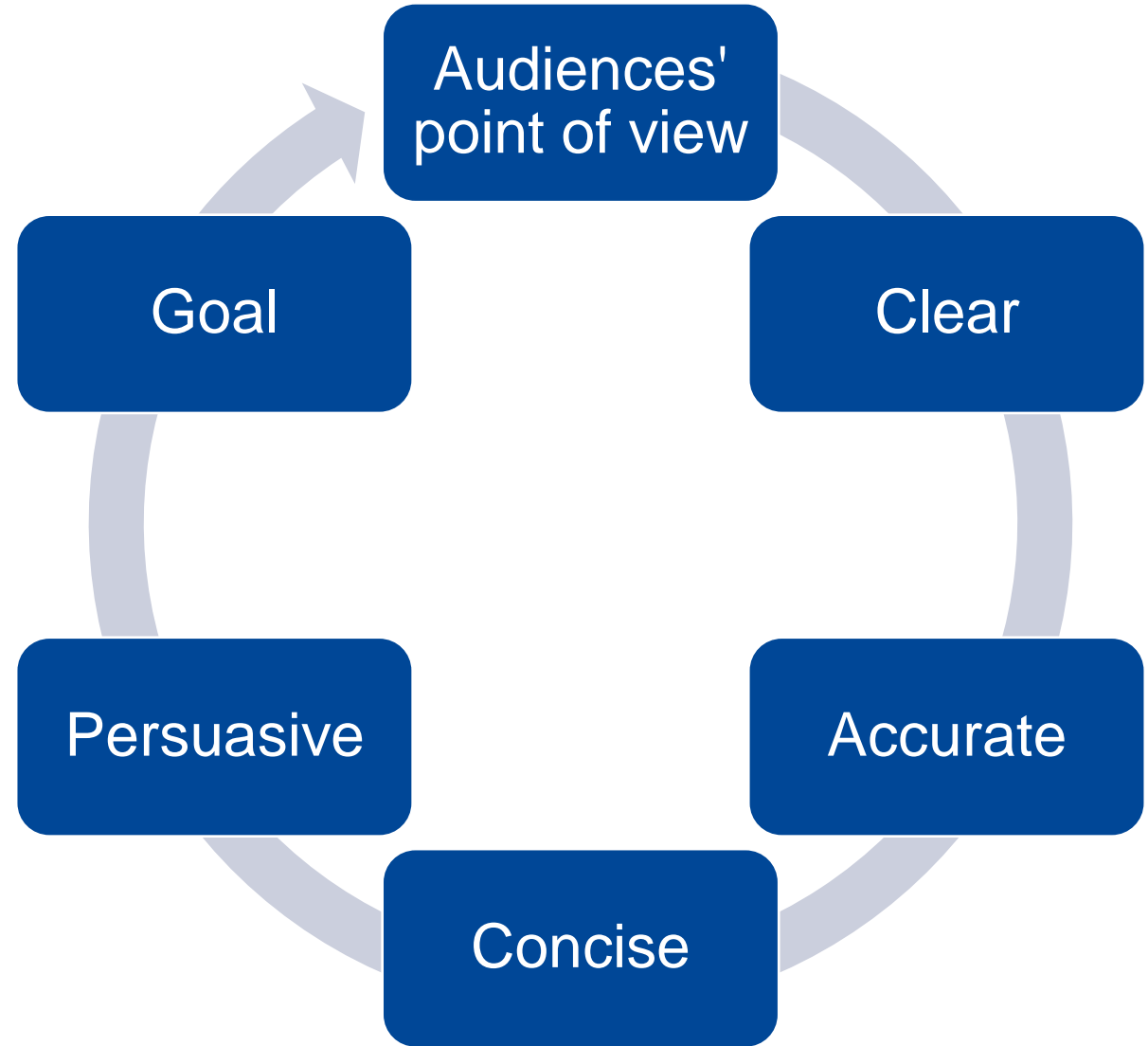
Engage front line staff in problem solving efforts

Defined report out cadence and use of standardized report out template and scorecard

The Ask

What do you need from the Leader?

Awareness   **Guidance**   **Resource**   **Decision**   **Action**

Froedtert & Medical College of Wisconsin

Joy of Medicine

Decision

- MCW (+/- Affiliates) submitting application for Bronze Status
  - PJ vs WOW Measurement
  - CI Representation on Steering Committee

Provider Training Team Status

Update

Change Management

- Awareness with Internal Provider Team 10/13
- Awareness with CI Department 10/20
- External Key Stakeholders
  - Chairs and DAs
  - MCP Ops
  - CP: Need further discussions on how Nikki connects with Kara Wiesner

Hiring Activities

- Positions in request process

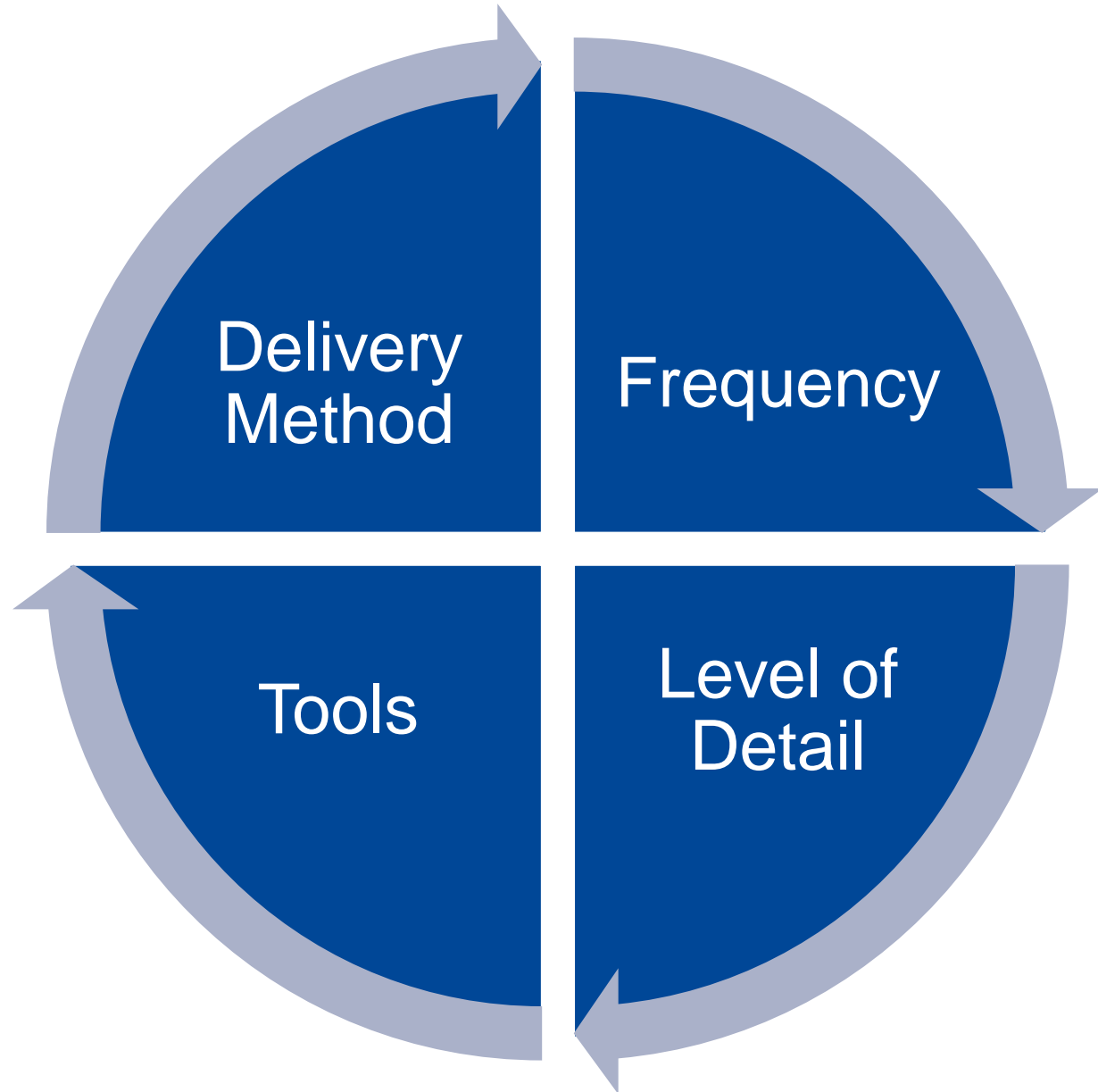**Amplifire**

- Contract in works
- Needs Scoping

⭐ Tool

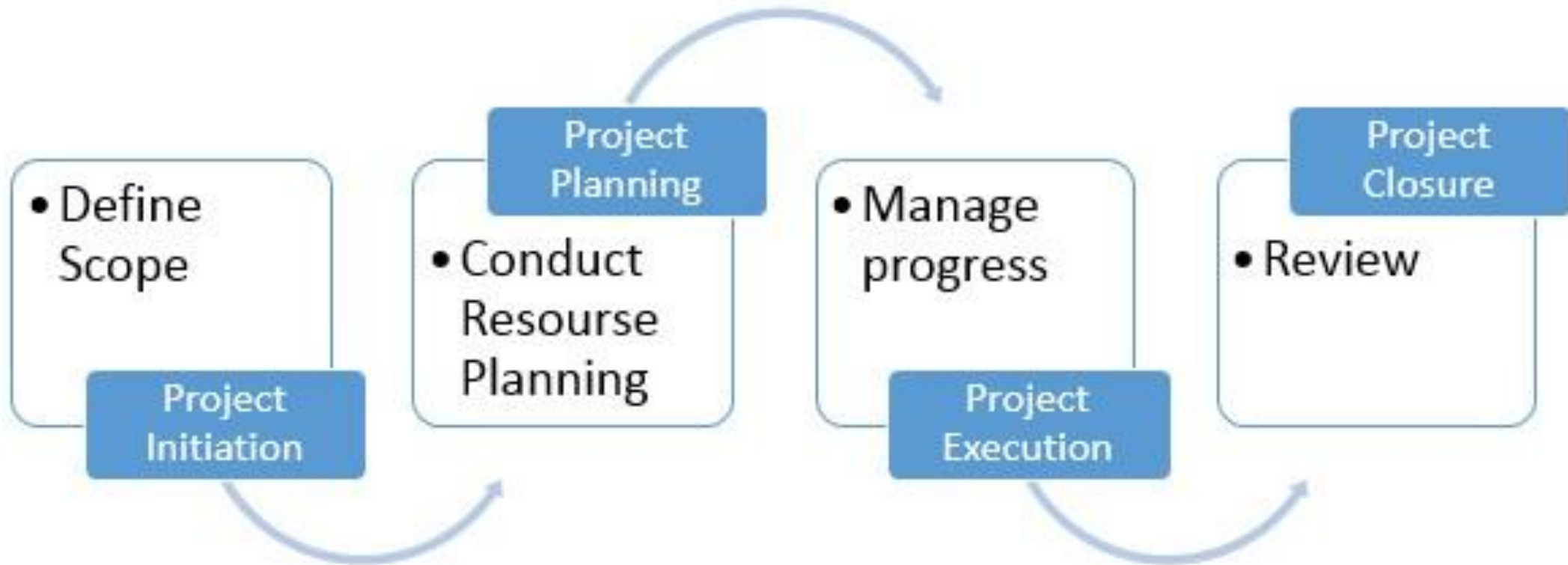# Adjusting your Style and Approach for the Audience
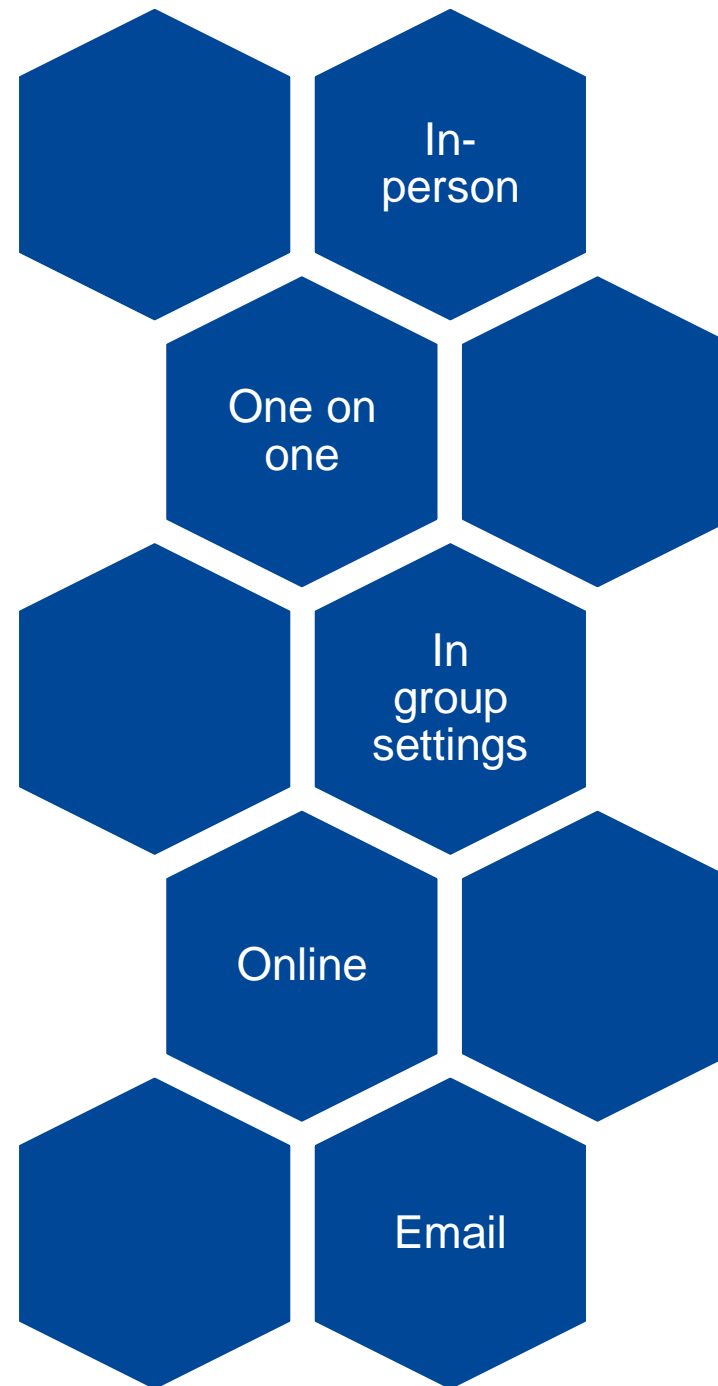
Not all executives are built the same

Froedtert & MEDICAL COLLEGE of WISCONSIN

Leader Defined Frequency vs Project Defined Frequency

Choose Delivery Method

In-person

One on one

In group settings

Online

Email

Froedtert & **Medical College of Wisconsin**

Communication Tools

- SBAR
- Work Inventory
- Project Action Tracker
- Traffic Light Report

SBAR

- Historically a Clinical Tool
- Effective tool for proposals
- Supports Solution-Based Thinking

S - Situation
B - Background
A - Assessment
R - Recommendation

Froedtert & MEDICAL COLLEGE of WISCONSIN

Work Inventory

- Helps your leader assess your capacity
- Portfolio Management

OAP Domain Summary - Overall

APP Practice	Operations	Workforce	Grand Total	FTE	per month	% utilization
1.5	4.5	14	20	0.2	32	63%
13	42.5	27.5	83	0.6	96	86%
36	118	12.5	166.5	0.8	128	130%
8	30.5	139	177.5	0.7	112	158%
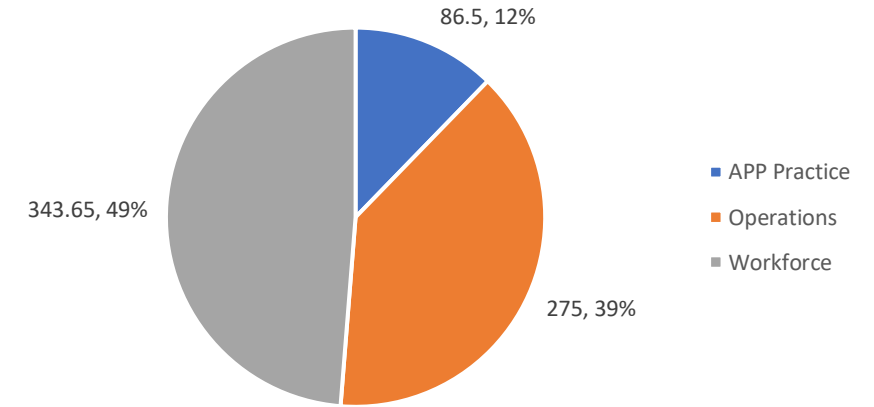
Department/	Title	Domain	Sub-Domain	Total Month	Status	OAP Personnel	Owner
OAP/EPIC	Ambulatory IT steering Committee	Operations	Process Improvement	2.0	Active	Jamie	Enterprise
OAP	APP Recognition and Professional Development (planning-Event	Operations	Recruitment & Retention	2.0	Active	Julie	MCW
OAP/FH	FMLH Nursing Leadership Meetings	Operations	Strategic Alignment/System Link	2.0	Active	Julie	FH
OAP	FMLH/MCW Safety & Quality Oversight Committee	Operations	Strategic Alignment/System Link	2.0	Active	Julie	FH
OAP	MCP Compensation Committee	Operations	Regulatory/Compliance	2.0	Active	Julie	MCP
OAP/FH	Medical Executive Committee	Operations	Strategic Alignment/System Link	2.0	Active	Julie	FH
OAP	Enterprise Critical Care Committee	Operations	Strategic Alignment/System Link	2.0	Active	Sarah	Enterprise
OAP	IP Leadership Council	Operations	Strategic Alignment/System Link	2.0	Active	Sarah	FH
OAP	VCBI Inpatient Clinical Operations Steering Team	Operations	Strategic Alignment/System Link	2.0	Active	Sarah	FH
OAP	MCW CE Committee	Workforce	Recruitment & Retention	2.0	Active	Amber	MCW
OAP	APP CC Education	Workforce	Scope of Practice	2.0	Active	Sarah	OAP
OAP	1:1 Rabaglia - ANS 2.0	APP Practice		2.0	Active	Jamie	OAP
OAP	MSO Froedtert AHP Sub-Committee	APP Practice	Scope of Practice	1.5	Active	Amber	OAP

Froedtert & MEDICAL COLLEGE of WISCONSIN

Project Action Tracker

	A	B	C	D	E	F	G	H
1	ID	Date Opened	Action Item	Owner	Priority	Due Date	% Complete	Status
2	AI1	2-Jun-17	Obtain API documentation from Visa, Mastercard	Daisy Barker	High	12-Jun-17	100%	Completed
3	AI2	2-Jun-17	Get connectivity details for the development, test and production environment from Visa, Mastercard	Wendy Nunes	High	20-Jun-17	80%	In Progress
4	AI3	10-Jun-17	Raise request with the network team to establish connectivity with the vendor systems	Anita Gomez	Medium	22-Jun-17	25%	In Progress
5	AI4	10-Jun-17	Test the connectivity with the vendor systems	Shane Pitt	Low	25-Jun-17	0%	Not Started
6	AI5	10-Jun-17	Development of the interfaces	Aditya Sehgal	High	30-Jun-17	0%	Not Started
7	AI6	15-Jun-17	Test the interfaces	Nicole Edward	Medium	1-Aug-17	0%	Not Started
8	AI7	15-Jun-17	Prepare API Documentation, User Manual with step by step guidelines	Tania Thomas	Low	8-Aug-17	0%	Not Started
9	AI8	18-Jun-17	Complete User Acceptance Testing	Tania Thomas	Medium	25-Aug-17	0%	Not Started
10	AI9	18-Jun-17	Prepare release notes	John Portelli	High	5-Sep-17	0%	Not Started
11	AI10	18-Jun-17	Release to Production environment	Donald Cooper	Medium	7-Sep-17	0%	Not Started
12	AI11	18-Jun-17	Send out Go Live communicatoin	Donald Cooper	High	10-Sep-17	0%	Not Started

Tool

Froedtert & MEDICAL COLLEGE of WISCONSIN
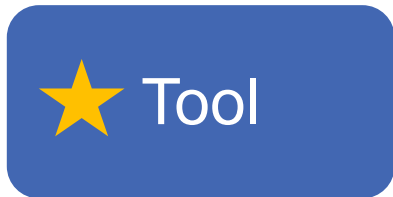
Traffic Light Report

Rating system for evaluating the performance in relation to a goal

Definition:

- A rating system.
- Evaluates the performance in relation to a goal.
- Results are expressed using the three colors of the real traffic lights (Red, Yellow and Green).

Benefits:

- Good and poor performance can easily be identified (universal).
- Supports decision making.

Applications:

- Performance and trend reports.
- Customer satisfaction reports.
- Financial and marketing reports.
- Quality and compliance audits.
- Risk management and safety audits.
- Staff performance management.

Results are expressed in Performance Management as:

- A performance that is far below target.
- A performance that is a bit below target.
- A performance that is expected or better than expected.

4.4%
3.1%
2.8%
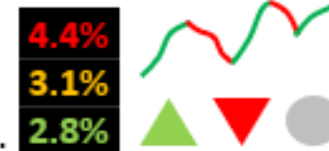
Results are expressed in Project Management as:

- An activity that is incomplete.
- Partially completed or was completed after due date.
- An activity that was completed on time or ahead of time.
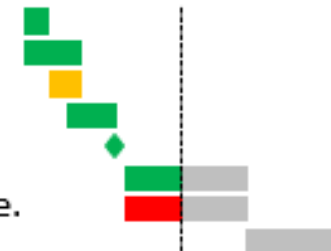
Other uses:

- Communicating production information (e.g., Andon display systems).
- Marking inventory levels and indicating the status of materials/products.
- Assessing the skill levels of the staff and determining the training needs.
- Knowing what a team think of a particular idea.
- Showing how much fat, sugar and salt exist in the food products.

www.**citoolkit**.com

31
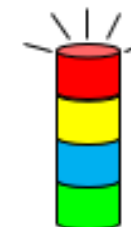
KEY PERFORMANCE METRICS

New Patients — At or above goal

% New Patients Seen in 10 Days or Under — Below goal

CAUTI/CLABSI Infection Count — Data lagged (FY 22 DATA LAGGED)

Length of Stay — Data lagged

Medical Practice Survey (formerly CG-CAHPS) — Below goal

H-CAHPS — Below goal

ED-CAHPS — Below goal

OAS-CAHPS — At or above goal

Access
Cost
Patient Experience
Quality
Safety

Froedtert & MEDICAL COLLEGE of WISCONSIN

Goal Setting

Goal Setting

- Connect with Institutional Goals and Values

Change Management

ADKAR®: Five Building Blocks of Successful Change

Awareness	Desire	Knowledge	Ability	Reinforcement
What is changing and why	Desire to participate	What is going to change and how	Build new skills and behaviors	Sustain change over time
Why?	What's in it for me?	What new skills will I need?	Demos	Celebrate new success
How big is this?	How will it help me?	How will I get them?	Deliver training	Recognition
When?	How can I help?	Who will help me and when?	Remove barriers	Shut the back door

Prosci® ADKAR Model: To help individuals and teams manage change successfully.

Froedtert & MEDICAL COLLEGE of WISCONSIN

Common Countermeasures For ADKAR GAPS

Awareness

- Create/revise change message & communication plan (why, what, and how)
- Leverage sponsorship (leadership)

Desire

- Manage resistance
- Engage Sponsorship for coaching and feedback

Knowledge

- Create/revise training plan

Ability

- Execute training plan
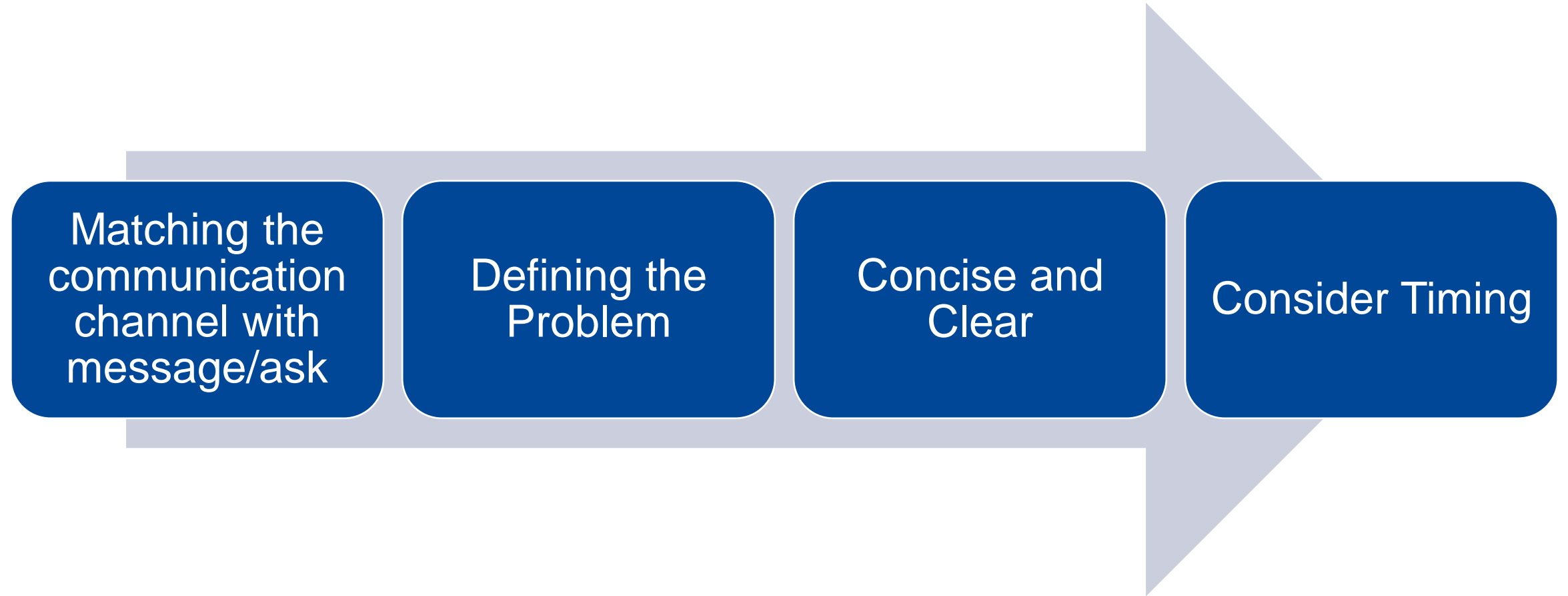- Identify barriers and coach staff

Reinforcement

- Communication Plan
- Engage Sponsorship for coaching and feedback

Froedtert & MEDICAL COLLEGE of WISCONSIN

Change Management KEY Takeaways

- Change Management is the **people-side** of planning, executing, and sustaining change

- Sponsors and champions play critical leadership roles to enact successful change
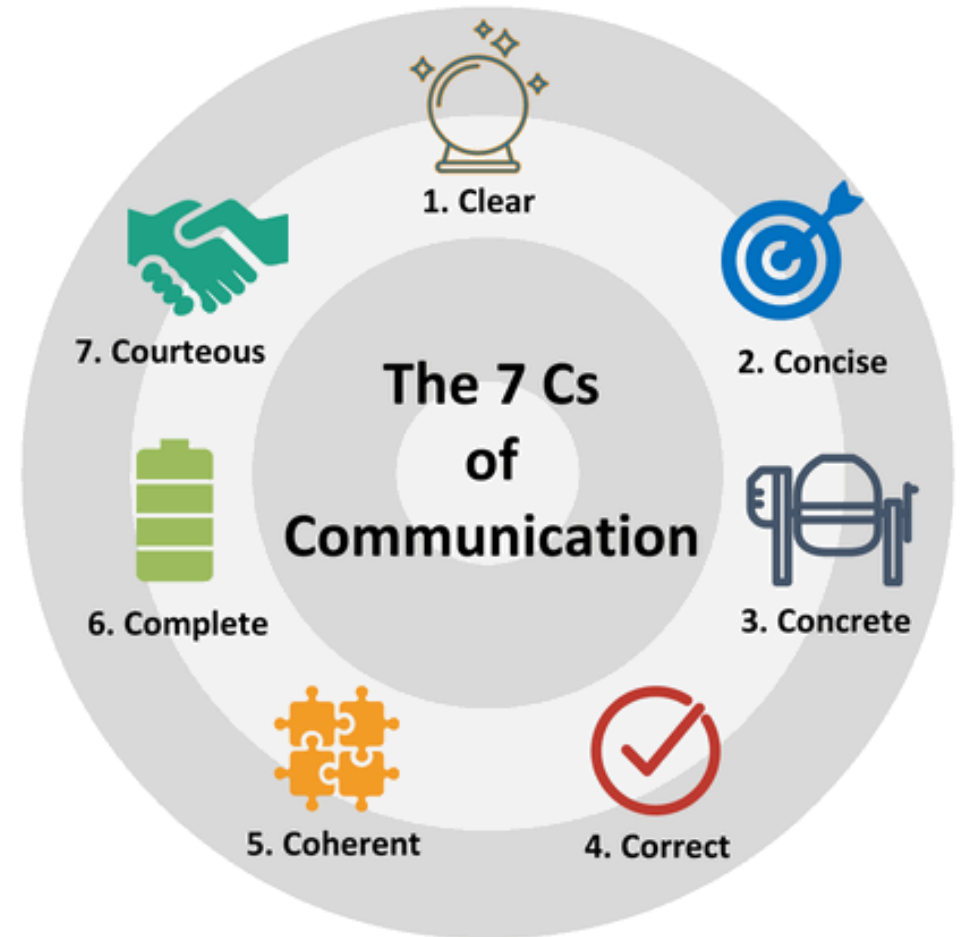
- Resistance is normal and expected

Froedtert & MEDICAL COLLEGE of WISCONSIN

Common Pitfalls

Communication Takes Planning

Matching the communication channel with message/ask → Defining the Problem → Concise and Clear → Consider Timing

Don't Forget about Bi-directional Communication

- **L**isten
- **E**ngage
- **A**lign
- **D**rive
- **E**valuate
- **R**espond

The 7 Cs of Communication
1. Clear
2. Concise
3. Concrete
4. Correct
5. Coherent
6. Complete
7. Courteous

Froedtert & Medical College of Wisconsin

Additional Resources
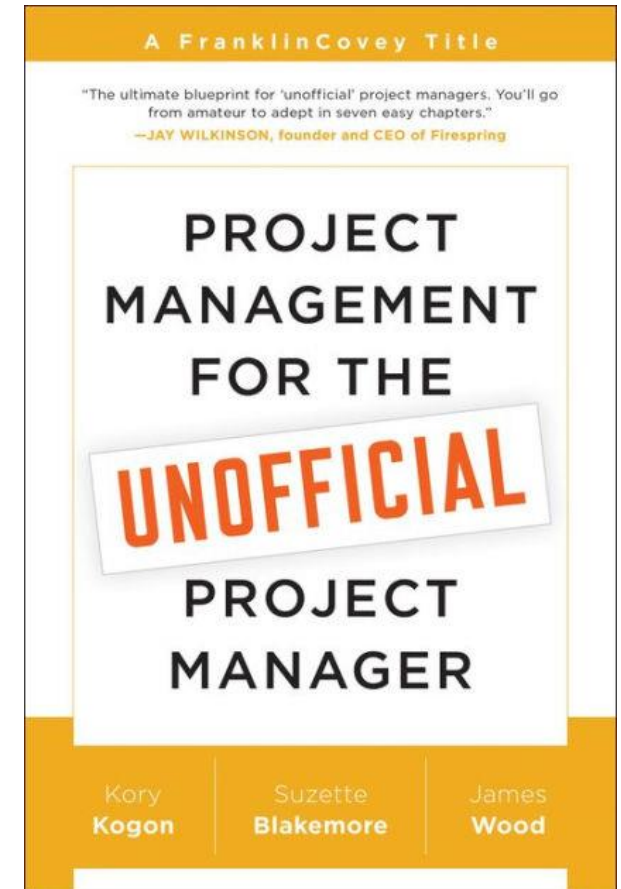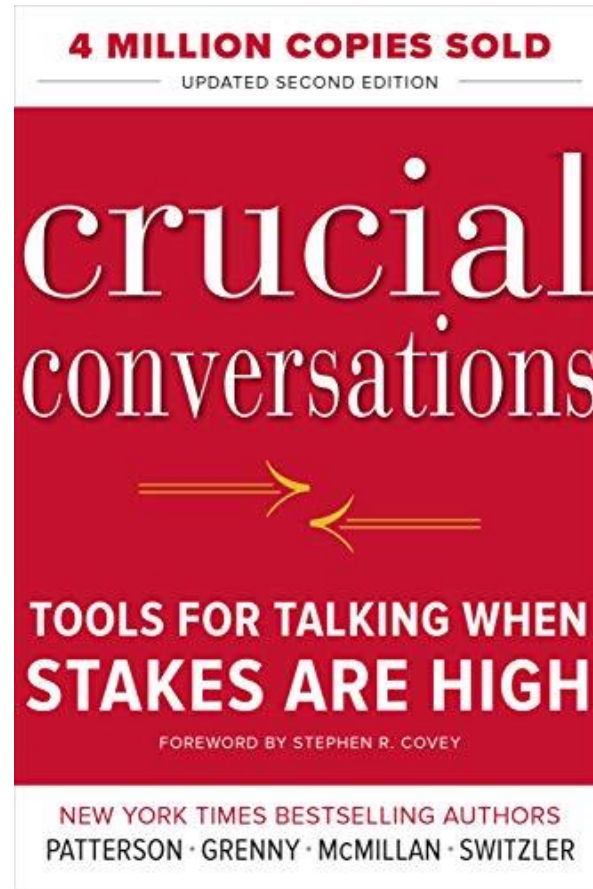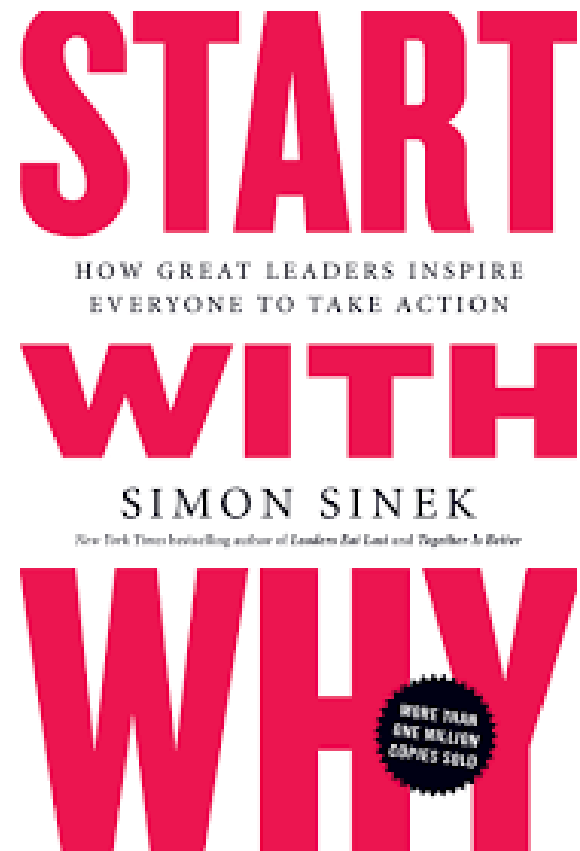
Break Out Questions

1. What are some tools you have used to communicate with executive leaders?
   - What has worked well?
   - What is a limitation of the tool you used?
2. What is the most challenging step of Change Management (think ADKAR steps)?
3. Share a unique way you turned a general goal into a SMART goal.

Thank you!

Jamie Silkey, PA-C | jsilkey@mcw.edu