

# RPR<sup>2</sup>

RIGHT PEOPLE, RIGHT ROLES



## Leadership and Management On-Boarding Roadmap

Assuring Success in the First 100 Days of Appointment

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# The Leadership and Management On-Boarding Roadmap

## *Assuring Success in the First 100 Days of Appointment* **Step by Step Manual**

**Orientation and required Reading:** Why organizations need a structured approach to leadership and management on-boarding.

**The challenge:** Research has shown that the overall success rates for people appointed into a new leadership or management role in Healthcare is **approximately 60%**. The number for those people that are new to their respective organization and role is even lower. The Top-10 “rate-limiting” factors that individually or collectively can contribute to the low success rate include:

1. Lack of demonstrated ability - not being talented enough (natural ability, learned skills, competency, experience etc.).
2. Not being emotionally ready for the increased responsibility (immaturity).
3. Underestimating the complexity (degree of difficulty) of the assignment.
4. The acceptance (trust and respect) of the leader/manager by the existing employees.
5. Ineffective behavioral style issues and/or conflicts with other leaders and staff.
6. Unclear and/or unrealistic expectations, no formal roadmap or game plan.
7. The inability or authority to make important decisions.
8. Lack of resources (tools, equipment, people, capital, physical space etc.).
9. Ineffective coaching, direction and/or guidance by the person’s immediate supervisor.
10. An unviable business model (a condition where it is unlikely that anyone would succeed).

**The Need:** With the increasing financial, job complexity and business model challenges that healthcare will face as the industry navigates the changes within the Affordable Care act, it is imperative that the leadership and management appointment rate success be higher than **60%**. Best practice organizations that have a structured approach to talent management have success rates that exceed **75%**. This gives them a significant competitive advantage and assures that leaders in the “C” suite spend more time on initiatives that take the organization to the next level of performance rather than wasting time managing the non-value added challenges associated with fixing common problems that they should (or could) have avoided.

In fact, healthcare executives (VP’s) tend to spend approximately 70% of their time on managing the bottom quartile performing departments (where up to two thirds of those existing managers will never be able to turn around the performance to an acceptable level). Most if not all of those appointments could have been avoided if the organization had the practice discipline to avoid overleveraging their leaders/managers and if the organization had a consistent formal approach to on-boarding new leaders to more assure their success.

**The Methodology:** Success Profiles has developed a leadership and management “on-boarding” process that provides the structured roadmap and game plan blueprint for all **"New"** leaders and managers to follow. The overall process incorporates a combination of diagnostic tools, leadership assessments, personal cultural inventory, goal prioritization steps, milestone timelines, action-planning functions, coaching plans, and performance metric determination and resource needs.

*“As goes the decisions that leaders make and the success they achieve in their first 100 days, so goes their performance over the long term.”*

### **The benefits of this process are:**

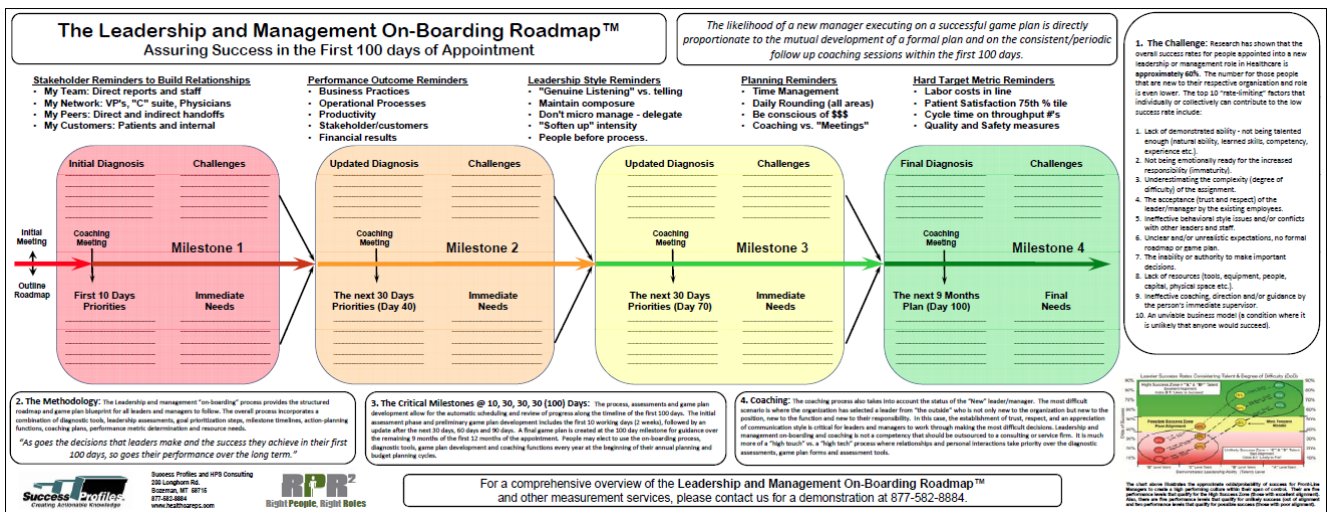
- Assuring proper alignment where we recommend that every leader and manager pass the initial “litmus test” for their relative odds of success before their appointment. This practice discipline helps avoid managers becoming immediately “overleveraged” (or in over their heads) with respect to managing complexity.
- Increasing the consistency of roadmap and blueprint game plans for everyone “New” (either appointed into a leadership role and/or for those that are existing leaders that are taking on increased responsibilities). See definition of “New” below.
- Evaluating what is needed for the New Leader to adapt to a new role, and depending on circumstances, facilitating a cultural fit with a new organization and/or community.
- Game plan alignment and “getting on the same page” with expectations, performance targets, priorities and resources needed. This is accomplished through the mutual development of the plan where all challenges are openly discussed and options for solutions are explored.
- Providing the structured timetable and planning tools for meetings and coaching sessions at the critical milestones within the first 100 days.
- A process that enhances the coaching relationship between leaders and direct reports where significant issues and challenges can be openly discussed in a safe and trusting environment.
- A connective link to leadership/professional development content and resources (articles, video clips, and individual assessments) where learning resources can be accessed for specific learning needs.
- A connective link to integrated performance measurement scorecards, performance management systems, individual behavioral style assessments, personalized coaching plans, and succession planning roadmaps.

**The definition of “New”:** The leader or manager could essentially be “New” if they are:

- New to the organization or campus (from the outside).
- New to the position (manager, director, VP or executive).
- New to the function (department or service line).
- New to the responsibility (from managing 3 functions -departments to managing 5).
- **New to all four.**

## Getting a Good Start

An organization makes a commitment to a New Leader when it selects them for a New Responsibility. Success in the New Role takes commitment from both parties. Once selected the New Leader works with their “coach” to establish an effective 100 Day Plan for success. By the end of the 100 Days, the New Leader will own the performance of their New Role, but during the on-boarding process, it is important for the New Leader to recognize the organization’s unique culture. The commitment to performance must come from both parties in order for a successful appointment to occur. Our New Leaders Flow Chart helps walk the New Leader through the process of understanding the appointment. Through this process the organization will earn the trust of the newly appointed leader and the leaders will earn the trust of their “coach” and the organization, by using a transparent 100 Day Plan with 4 distinct Milestones of performance.



## Example of large format version of the 100 day Leadership and Management Game Plan

**The Critical Milestones @ 10, 30, 30, 30 (100) Days:** The process, assessments and game plan development allow for the automatic scheduling and review of progress along the timeline of the first 100 days. The initial assessment phase and preliminary game plan development includes the first 10 working days (2 weeks), followed by an update after the next 30 days, 60 days and 90 days. A final game plan is created at the 100 day milestone for guidance over the remaining 9 months of the first 12 months of the appointment. If the assignment or increase in responsibility includes a “turn-around” of a low performing department/function, coaching sessions can be scheduled more frequently (at one and two week intervals or as needed). People may elect to use the on-boarding process, diagnostic tools, game plan development and coaching functions every year at the beginning of their annual planning and budget planning cycles.

*“The likelihood of a new manager executing on a successful game plan is directly proportionate to the mutual development of a formal plan and on the consistent/periodic follow up coaching sessions within the first 100 days.”*

**The Game Plan Development:** For a leadership/management on-boarding plan to have high probability of success, there are several elements that must be mutually agreed upon by the newly appointed leader/manager and their immediate supervisor/coach.

- An agreement on how to make a first impression to build trust with superiors, peers, direct reports and staff. The “cultural fit” game plan to win respect and support.
- An accurate and objective diagnosis of the “as is” state of performance when the new leadership/management assumes responsibility (from high performing to “a turnaround”).
- An understanding, agreement and “cascade alignment” of the performance expectations established by the organization, the senior leaders and immediate supervisor (hard metrics).
- An understanding and agreement with the leadership effectiveness and cultural – engagement expectations established by HR (the P MEC and T MEC soft metrics).
- A mutually agreed upon list of priorities and action items (think who first, then what).
- A realistic timeline to achieve the desired performance outcomes.
- The authority to make day to day decisions.
- The resources to be successful (capital, staffing, tools/equipment, physical space etc.)
- The ability to establish the “direct report” leaders reporting up to the new leader/manager.
- The ability to make staffing decisions with disruptive employees that could be negative, pessimistic and unwilling to change/adapt to the new standards that are established.
- The flexibility to change and adjust the game plan based upon potential changing conditions, dynamics and assumptions.
- A protocol of how the newly appointed leader/manager and their respective coach (immediate supervisor) are going to disagree so that they can work through crucial conversations.

**EXERCISE:** Take a moment to think back to a time when you were in a “new” situation or position of responsibility.

**What went well?** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**What didn't go well?** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Think back to a time when someone was appointed to a “new” situation or position of responsibility in this organization.

**What went well?** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**What didn't go well?** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***The Coaching Relationship:*** A person that has an existing relationship with their respective coach (immediate supervisor) has a real advantage in achieving a more successful on-boarding process. People who have worked together usually have an understanding and appreciation of a person’s behavioral style, practice discipline habits and tendencies. Our research has shown that when people at or above the Director level of leadership struggle or fail, the majority of the time it’s related to their ineffective behavioral style. The on-boarding game plan provides the structure, timetable and scripted discussion topics for people to more effectively work together as a team to solve their most difficult challenges.

The coaching process also takes into account the status of the “New” leader/manager. The most difficult scenario is where the organization has selected a leader from “the outside” who is not only new to the organization but new to the position, new to the function and new to their responsibility. In this case, the establishment of trust, respect, and an appreciation of communication style is critical for leaders and managers to work through making the most difficult decisions. There is a special section contained within the coaching plan to explore and assess a leader and manager’s preferred behavioral style.

***Transferability:*** The methodology designed into the leadership and management on-boarding process is relatively easy for any organization to adopt. There is no special software to install, firewall security concerns and there are on-demand tutorials to assist people with every aspect of the process. The entire suite of leadership performance and talent management tools are interconnected and game plan development applications are linked within the Microsoft Office program of Excel.

Leadership and management on-boarding and coaching is not a competency that should be outsourced to a consulting or service firm. It is much more of a “high touch” vs. a “high tech” process where relationships and personal interactions take priority over the diagnostic assessments, game plan forms and assessment tools.

*"You never get a second chance to make a first Impression."*

**and...**

*"Prescription without Diagnosis is considered Malpractice."*

As you begin the leadership and management on-boarding process the **"New"** leader/manager will have to establish positive, trusting relationships with all the leaders in their network and the staff in their respective departments. When they connect with the people within their span of responsibility, everything they do going forward will be easier - if they don't, everything will be harder.

### **Step 0: Prep work for the first coaching session:**

**It is very important for the first coaching session to be as productive as possible. Therefore, both the "Coach" and the "New" leader/manager must be prepared to review as much readily available information about the "as is" performance of the new assignment.** If the information cannot be available for the first coaching meeting, it should be assembled ASAP for the next scheduled session within the first 10 days. This information should include...

#### ***Initial Diagnosis of department performance:***

- Employee survey results (this should summarize the overall engagement and cultural health).
- Stakeholder feedback on business practices (patient and/or physician satisfaction).
- Talent management review for managers/supervisors (top down "Eye Chart" - TMEC).
- Performance review summaries for managers/supervisors.
- A summary of the history of the department/function (over the last 5 years).
- Summary of quality and safety data on performance outcomes.
- Summary of the financial results.
- Summary on productivity and/or process improvements.
- Any other performance data or observations.

**At the first coaching session, the following decisions will be made to create the initial Game Plan:**

**Both the Coach and "New" leader must mutually agree upon the following...**

1. **What is new** for the "New" leader/manager, and where will they need help.
2. The overall assessment of the "as is" performance of the new assignment and the **initial diagnosis** of the current state.
3. The **challenges** that the "New" leader/manager will face.
4. The **priorities** at each milestone interval (10, 30, 30, 100 etc.).
5. The **immediate needs** for the "New" leader (resources, tools, equipment, people etc.).



**For the entirety of the exercise in this manual think of a new leader or a leader in a new role so that you can better frame the answers you will complete throughout the manual. This is good practice before you get onto the online tool.**

**New Leader** \_\_\_\_\_ **Position:** \_\_\_\_\_ **Tenure:** \_\_\_\_\_

- Complexity of assignment = **Higher Medium Lower**
- Demonstrated leadership ability level (top down TMEC evaluation) = **A B+ B B- C D**
- Overall odds of success (refer to probability of success chart) \_\_\_\_\_%
- Management effectiveness (bottom up PMEC evaluation) = **Red Orange Yellow Green**
- Cultural engagement score (from EE survey) = **Red Orange Yellow Green**
- Coachability = **Highly Coachable Coachable Somewhat Coachable Uncoachable**
- Behavioral profile \_\_\_\_\_ Self regulation intensity \_\_\_\_\_
- 360 degree feedback or performance review evaluation. \_\_\_\_\_

### ***Cultural Fit***

The first step in adjusting to a new role and responsibility is a lot more involved than moving into a new office and identifying whether a new leader has worked before in this department or in healthcare. Fitting into the culture of a new organization is a complicated puzzle-building process. In order to start off with the greatest chance of success, Success Profiles recommends the New Leader goes through the New Leader Flow Chart. Going through the NL Flow Chart reveals the full spectrum of issues that can make life much, much better or worse for a New Leader, especially if left unresolved. Best if it is done with the immediate supervisor, but in any case fully advising the supervisor of what is learned and actions to take.

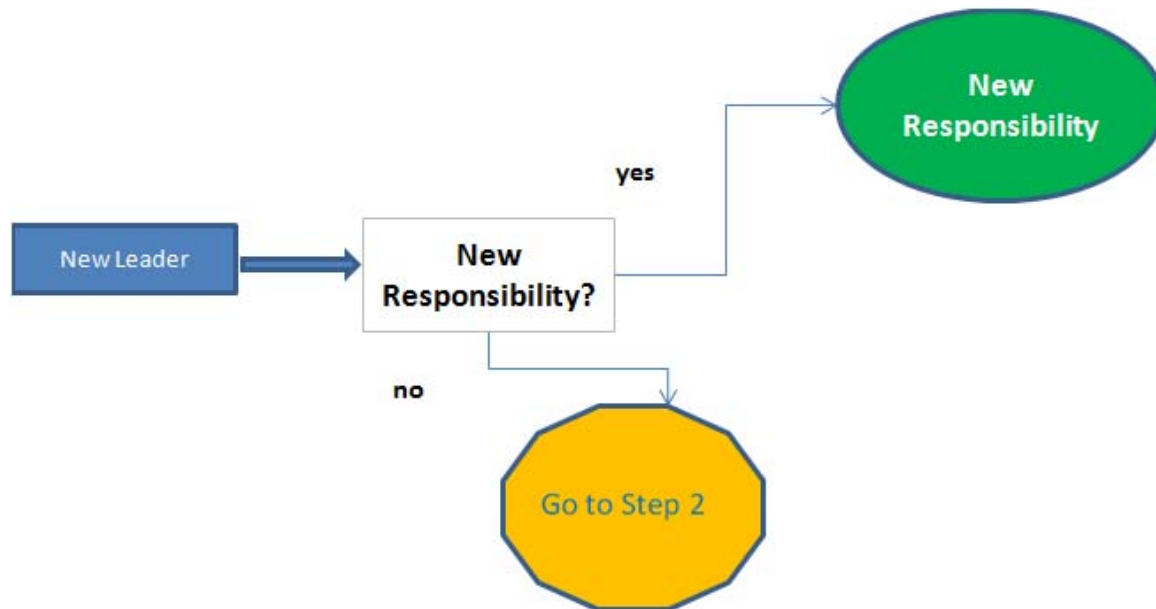
The real benefit of the NL Flow Chart questions is they guide the New Leader to appropriate worksheets which ultimately focus discussions between the New Leader and their supervisor, new peers, and employees that helps everyone make sure the new leader has the best chance to fit into the organization. Taking into account the issues that will make the cultural fit a success makes the New Leader's task of improving the business and performance of the organization much easier. Too often these necessary steps are left unsaid and misunderstood. The resulting missteps make it more difficult to be successful. Therefore, the NL Flow Chart ensures the best possible cultural fit and allows the most undistracted focus on outstanding performance for the New Leader in your organization

### **Step 1: Define the changes the New Leader will have to make to be successful in**

**the new role:** Whenever a new responsibility is taken on, the dynamics of role, available time and people change. This change is tied to a new responsibility. Therefore, the NL Flow Chart starts at the most fundamental point: Is this a new responsibility? What is new for the New Leader? What is different? Ultimately, this is all so we can get to determining how can we help the New Leader be successful and how can the New Leader help us be successful.

Once the actions for Step 1 are defined, the New Leader can incorporate this insight into starting Step 2, defining the business situation. This process reinforces People First Business Practices.

If this is a new responsibility, the answer is yes. Clicking on the green oval takes the New Leader to the New Responsibility Worksheet, where the New Leader defines exactly what is new for him/her about the new responsibility. After finishing the Worksheet, the New Leader goes to the next question of the flowchart by clicking on the “RETURN TO NEXT QUESTION” link at the bottom of the Worksheet.

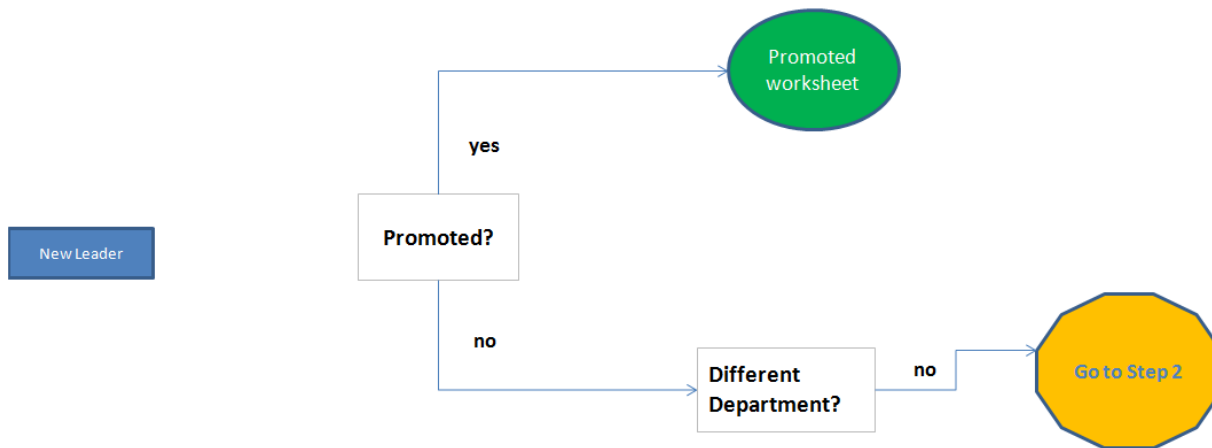


## Guidelines for Worksheets

The worksheets are both a checklist and a guided discussion between New Leaders and their immediate supervisors. The topics are not all encompassing. If a New Leader or supervisor thinks of other topics or items, they should absolutely be included. Some topics may take a lot of depth and work, some might be trivial, but as all are possible concerns for moving into a new responsibility or line of work or location, they should all be discussed up front to make sure there is a common understanding.

## NEW RESPONSIBILITY WORKSHEET

- a. New Responsibility
- b. New technical area/subject matter
- c. New subordinate leaders
- d. new employees
- e. new work unit
- f. greater span of control
- g. less time for each duty
- h. new issues



## ***Being Promoted or Being Moved to a Different Department***

Next Question: This may not just be a new responsibility but also a new situation. A promotion is a new view, a different angle on the organization, new ways to deal with people, new ways to look at problems, a more inclusive approach. A different department is a new group of people, new technical issues, different working relationships.

Sometimes, it may not seem like a big change to management, but the New Leader may feel apprehension about these changes, whether or not they appear to be small. This is another excellent opportunity to use the worksheet as a guided discussion for the New Leader’s concerns. This, and following discussions also, are a terrific opportunity for the supervisor to strengthen the relationship with the New Leader and to give guidance at an especially meaningful time.

### **NEW TO DEPARTMENT WORKSHEET**

- a. New boss
- b. New peers
- c. New employees
- d. new issues
- e. new culture

### **NEW PROMOTION WORKSHEET**

- a. Boss higher up in chain
- b. more employees
- c. more vertical relationship with front-line workers
- d. added responsibility for overall organizational success
- e. more external focus
- f. new peers
- g. new style required

## **NEW TO CAMPUS WORKSHEET**

- a. Different logistics/more difficult logistics
- b. impact on family/personal time
- c. New neighborhood

## **NEW TO ORGANIZATION WORKSHEET**

- a. new culture
- b. new boss
- c. new org structure
- d. new systems
- e. new customers

### ***Working for Profit/Non-Profit – New to Healthcare***

Healthcare has 2 different models of business practice; for profit and for non-profit. The different models may not require a different way to do the job the New Leader is about to take on, but it is always wise to understand the objectives, constraints, and purpose of the new organization especially if it turns out the New Leader has not been in that business before.

Healthcare also has a different culture and sensibility than other businesses that are strictly for transactions that deal with products or commodities less than the health of people. It is new and it is important to specifically say what that means to New Leaders who have not worked in Healthcare before.

### ***New to Community/USA***

The transition is not only for the New Leader, but also his relationship with family, friends and interests. Talking about what the move means to the New Leader and going through the details will allow the new organization to help all that is possible can. Even if all the issues can't be solved, the commitment of the organization and the supervisor to help all it can mean enough to the New Leader to make a big difference in their commitment to overcome any hardships associated with the move and build stronger loyalty to the new organization .

## NEW TO COMMUNITY WORKSHEET

- a. new location (weather, population, transportation, housing)
- b. new community (people, activity, interests)
- c. new family interests
- d. new personal appearance standards
- e. new social standards
- f. new communication styles
- g.

## NEW TO PROFIT AND NON-PROFIT WORKSHEET

- a. new culture
- b. new measures of win loss
- c. new expectations
- d. new business model

## NEW TO HEALTH CARE WORKSHEET

- a. New culture
- b. new objectives
- c.
- d.
- e.

## NEW TO USA WORKSHEET

- a. Culture
- b. security
- c. home country ties/commitments/responsibilities
- d. making friends
- e. meeting people
- f. language
- g. family
- h. sense of community
- i. sense of adventure

## Step 2: The Situation

As if you were a new player at a high stakes card game, evaluate "the hand that the "New" leader/manager has been dealt. Question: Is the assignment a "turnaround" of performance or is the operation running smoothly with high performance outcomes? Rate on a scale of 1 to 5. (circle one)

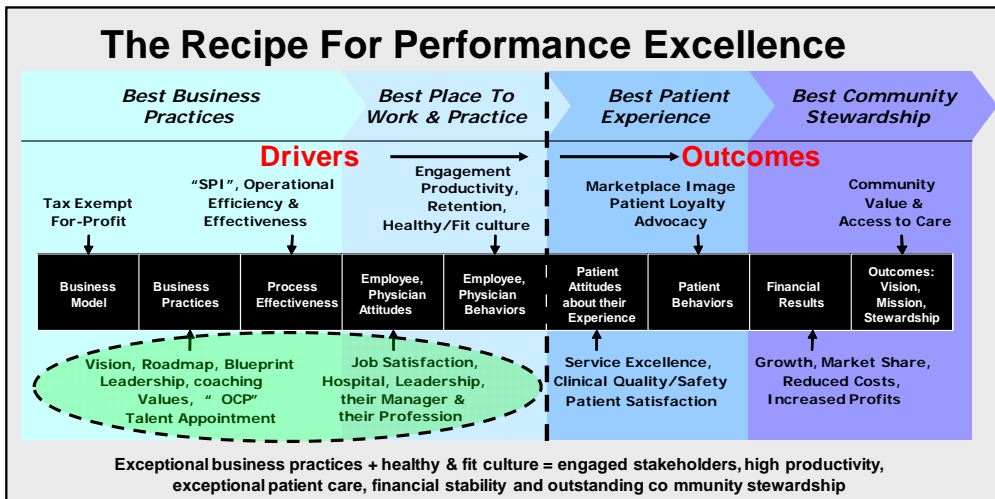
1. A complete "turnaround" (dysfunctional culture with unacceptable outcomes/results)
2. Needs significant change and improvement (unhealthy culture and poor outcomes/results).
3. Average to Satisfactory performance (inconsistent - some areas, metrics doing well others are not).
4. Doing well (good performance, expected metrics in all areas)
5. Outstanding performance (hitting and exceeding all performance metrics/expectations).

**Average to Satisfactory performance (inconsistent - some areas, metrics doing well others are not).**

A complete "turnaround" (dysfunctional culture with unacceptable outcomes/results)  
 Needs significant change and improvement (unhealthy culture and poor outcomes/results).  
 Average to Satisfactory performance (inconsistent - some areas, metrics doing well others are not).  
 Doing well (good performance, expected metrics in all areas)  
 Outstanding performance (hitting and exceeding all performance metrics/expectations).

## Step 3: Prioritization

Evaluating both the "Drivers and Outcomes" of performance, establish the Initial diagnosis of the key expectations/results and priorities to address:



**Key metric/outcome of performance**                      **Priority**

Financial performance \_\_\_\_\_

People metrics/performance \_\_\_\_\_

Cultural metrics/environment \_\_\_\_\_

Stakeholder service (customer/patients) \_\_\_\_\_

Stakeholder outcomes (quality, safety) \_\_\_\_\_

Other outcomes \_\_\_\_\_

Other outcomes \_\_\_\_\_

<b><u>Priority</u></b>	<b><u>Outcome</u></b>
1st	Cultural metrics/environment
2nd	Stakeholder outcomes (quality, safety)
3rd	
4th	Financial performance People metrics/performance Cultural metrics/environment Stakeholder service (customer/patients) Stakeholder outcomes (quality, safety)
5th	

Your initial "detailed diagnosis" of the **Financial Outcomes/Results** of the entire span of responsibility:

**Key Financial metrics**

**Target goal**

- |          |       |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |
| 4. _____ | _____ |
| 5. _____ | _____ |

<u>Key Financial Metrics</u>		<u>Target Goal</u>
1	Profit and Loss	Completed on time - Profitable
2	Revenue to Payroll	(+ 2%)
3	Revenue Increase	7%
4		
5		



Your top three priorities for the financial outcomes to populate the "Game Plan Roadmap":

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

<b>Your top three priorities for the financial outcomes to populate the "Game Plan Roadmap":</b>	
1	To manage communication about financial results/metrics in a timely manner (quarterly)
2	To be proficient in managing and measuring profitability
3	Hit profitability targets






## Your initial diagnosis of the People and Culture:

To evaluate the people in a management role reporting to the "New" person, refer to:

1. The "Bottom Up" employee survey results (Performance Management "Eye Chart") to determine the leadership/management index score and the overall health of the culture (trifecta index of job satisfaction, loyalty, engagement etc.) and...
2. The "Top Down" demonstrated leadership effectiveness results (Talent Management "Eye Chart") to determine the leadership rank, complexity of the assignment, obstacles/barriers, and overall odds of success.

Leader #1 (FirstName LastName)	Timothy Lewis
Position	Director of Sales
Tenure (Years)	14
Complexity of Assignment	Medium
Demonstrated Leadership Ability Level (Top-Down TMEC if available)	B
Overall Odds of Success (refer to probability of success chart)	45% ("B" in High)
Management Effectiveness (Bottom up PMEC if available)	YELLOW
Cultural Engagement Score (From PMEC or Employee Survey)	ORANGE
Coachability (using coachability assessment scale 1 to 10)	Somewhat Coachable
Behavioral Profile	Networker
Self Regulation intensity	75
360 ° feedback or performance review evaluation	3.87
Obstacles and/or barriers to manage (Scale 0 to -20)	-9.45
Words that describe the overall culture	Challenging
	

Leader #1 \_\_\_\_\_ Position: \_\_\_\_\_ Tenure: \_\_\_\_\_

- Complexity of assignment = **Higher Medium Lower**
- Demonstrated leadership ability level (top down TMEC evaluation) = **A B+ B B- C D**
- Overall odds of success (refer to probability of success chart) \_\_\_\_\_%
- Management effectiveness (bottom up PMEC evaluation) = **Red Orange Yellow Green**
- Cultural engagement score (from EE survey) = **Red Orange Yellow Green**
- Coachability = **Highly Coachable Coachable Somewhat Coachable Uncoachable**
- Behavioral profile \_\_\_\_\_ Self regulation intensity \_\_\_\_\_
- 360 degree feedback or performance review evaluation. \_\_\_\_\_
- Obstacles and/or barriers to manage: \_\_\_\_\_
- Words that describe the overall culture \_\_\_\_\_

**Leader #2** \_\_\_\_\_ Position: \_\_\_\_\_ Tenure: \_\_\_\_\_

- Complexity of assignment = **Higher Medium Lower**
- Demonstrated leadership ability level (top down TMEC evaluation) = **A B+ B B- C D**
- Overall odds of success (refer to probability of success chart) \_\_\_\_\_%
- Management effectiveness (bottom up PMEC evaluation) = **Red Orange Yellow Green**
- Cultural engagement score (from EE survey) = **Red Orange Yellow Green**
- Coachability = **Highly Coachable Coachable Somewhat Coachable Uncoachable**
- Behavioral profile \_\_\_\_\_ Self regulation intensity \_\_\_\_\_
- 360 degree feedback or performance review evaluation. \_\_\_\_\_
- Obstacles and/or barriers to manage: \_\_\_\_\_
- Words that describe the overall culture \_\_\_\_\_

**Leader #3** \_\_\_\_\_ Position: \_\_\_\_\_ Tenure: \_\_\_\_\_

- Complexity of assignment = **Higher Medium Lower**
- Demonstrated leadership ability level (top down TMEC evaluation) = **A B+ B B- C D**
- Overall odds of success (refer to probability of success chart) \_\_\_\_\_%
- Management effectiveness (bottom up PMEC evaluation) = **Red Orange Yellow Green**
- Cultural engagement score (from EE survey) = **Red Orange Yellow Green**
- Coachability = **Highly Coachable Coachable Somewhat Coachable Uncoachable**
- Behavioral profile \_\_\_\_\_ Self regulation intensity \_\_\_\_\_
- 360 degree feedback or performance review evaluation. \_\_\_\_\_
- Obstacles and/or barriers to manage: \_\_\_\_\_
- Words that describe the overall culture \_\_\_\_\_

**Leader #4** \_\_\_\_\_ Position: \_\_\_\_\_ Tenure: \_\_\_\_\_

- Complexity of assignment = **Higher Medium Lower**
- Demonstrated leadership ability level (top down TMEC evaluation) = **A B+ B B- C D**
- Overall odds of success (refer to probability of success chart) \_\_\_\_\_%
- Management effectiveness (bottom up PMEC evaluation) = **Red Orange Yellow Green**
- Cultural engagement score (from EE survey) = **Red Orange Yellow Green**
- Coachability = **Highly Coachable Coachable Somewhat Coachable Uncoachable**
- Behavioral profile \_\_\_\_\_ Self regulation intensity \_\_\_\_\_
- 360 degree feedback or performance review evaluation. \_\_\_\_\_
- Obstacles and/or barriers to manage: \_\_\_\_\_
- Words that describe the overall culture \_\_\_\_\_

Your top three priorities for the People outcomes to populate the "Game Plan Roadmap":

1	Help reduce the obstacles for Mark Thones
2	Coach Shannon on regulating intensity
3	Intervene with Region 4 team



Your top three priorities for the People outcomes to populate the "Game Plan Roadmap":

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Your top three priorities for the Culture outcomes to populate the "Game Plan Roadmap":


1	Improve the work processes in all teams
2	Create open door policy
3	Rounding



Your top three priorities for the Culture outcomes to populate the "Game Plan Roadmap":

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Your initial diagnosis of other Business Practices:

Overall Customer/Patient Service Orientation or focus	Average to Satisfactory performance (inconsistent - some areas).
Overall Values that are lived	Doing well (good performance).
Overall Operational Excellence (performance improvement)	Needs significant change and improvement (unhealthy to poor).
Other Business Practice	
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;">  <p><b>BACK</b></p> </div> <div style="font-size: small;"> <p>A complete "turnaround" (dysfunctional).              Needs significant change and improvement (unhealthy to poor).              Average to Satisfactory performance (inconsistent - some areas).              Doing well (good performance).              Outstanding performance (hitting and exceeding all performance metrics/expectations).</p> </div> </div>	

**Overall Customer/Patient Service Orientation or focus: Rate on a scale of 1 to 5. (circle one)**

1. A complete "turnaround" (dysfunctional).
2. Needs significant change and improvement (unhealthy to poor).
3. Average to Satisfactory performance (inconsistent - some areas).
4. Doing well (good performance).
5. Outstanding performance (hitting and exceeding all performance metrics/expectations).

**Overall Values that are lived: Rate on a scale of 1 to 5. (circle one)**

1. A complete "turnaround" (dysfunctional).
2. Needs significant change and improvement (unhealthy to poor).
3. Average to Satisfactory performance (inconsistent - some areas).
4. Doing well (good performance).
5. Outstanding performance (hitting and exceeding all performance metrics/expectations).


**Overall Operational Excellence (performance improvement): Rate on a scale of 1 to 5. (circle one)**

1. A complete "turnaround" (dysfunctional).
2. Needs significant change and improvement (unhealthy to poor).
3. Average to Satisfactory performance (inconsistent - some areas).
4. Doing well (good performance).
5. Outstanding performance (hitting and exceeding all performance metrics/expectations).

**Other Business Practice \_\_\_\_\_: Rate on a scale of 1 to 5. (circle one)**

1. A complete "turnaround" (dysfunctional).
2. Needs significant change and improvement (unhealthy to poor).
3. Average to Satisfactory performance (inconsistent - some areas).
4. Doing well (good performance).
5. Outstanding performance (hitting and exceeding all performance metrics/expectations).


Your top three priorities for the Business Practices to populate the "Game Plan Roadmap":	
1	Lead by example
2	Focus on Customer Service Excellence
3	



**Your top three priorities for the Business Practices to populate the "Game Plan Roadmap":**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_


## Your initial diagnosis of the Quality and Safety Outcomes:

<b>Overall Quality and Safety Performance</b>	<b>Needs significant change and improvement (unhealthy to poor).</b>
	<small>A complete "turnaround" (dysfunctional).                  Needs significant change and improvement (unhealthy to poor).  <b>Average to Satisfactory performance (inconsistent - some areas).</b>                  Doing well (good performance).                  Outstanding performance (hitting and exceeding all performance metrics/expectations).</small>

**Overall Quality and Safety performance: Rate on a scale of 1 to 5. (circle one)**

1. A complete "turnaround" (dysfunctional).
2. Needs significant change and improvement (unhealthy to poor).
3. Average to Satisfactory performance (inconsistent - some areas).
4. Doing well (good performance).
5. Outstanding performance (hitting and exceeding all performance metrics/expectations).

<u>Key Quality/Safety Metrics</u>		<u>Target Goal</u>
1	Improve National % ranking	90%
2	Reduce Accidents	no accidents next quarter
3		
4		
5		



**Key Quality/safety metrics**

**Target goal**

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Your top three priorities for Quality and Safety to populate the "Game Plan Roadmap":	
1	Define Quality for span of control
2	Set a standard
3	Measure quality monthly

Your top three priorities for Quality and Safety to populate the "Game Plan Roadmap":

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Summary information to populate the On-Boarding Roadmap Game Plan:

## Initial Diagnosis (max 725 characters):

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Several depts are in a turnaround situation due to previous leadership and will require new appointments and unbalanced attention and leadership. The staff and processes in place are solid, but the outcomes have failed to meet the organizations standards. Focus needs to be put back on the customer and financial outcomes to make the depts viable.



**INITIAL DIAGNOSIS**

Several depts are in a turnaround situation due to previous leadership and will require new appointments and unbalanced attention and leadership. The staff and processes in place are solid, but the outcomes have failed to meet the organizations standards. Focus needs to be put back on the customer and financial outcomes to make the depts viable.





**Priorities (max 725 characters):**

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Make recommendations of appointment changes in the depts. Beginning interviewing and making new appointments. Report outcome metrics and track progress. Begin rounding and partnering, especially in the depts that need the most immediate attention.



Page

**FIRST 10 DAYS PRIORITIES**

Make recommendations of appointment changes in the depts. Beginning interviewing and making new appointments. Report outcome metrics and track progress. Begin rounding and partnering, especially in the depts that need the most immediate attention.

**Immediate Needs (max 725 characters):**

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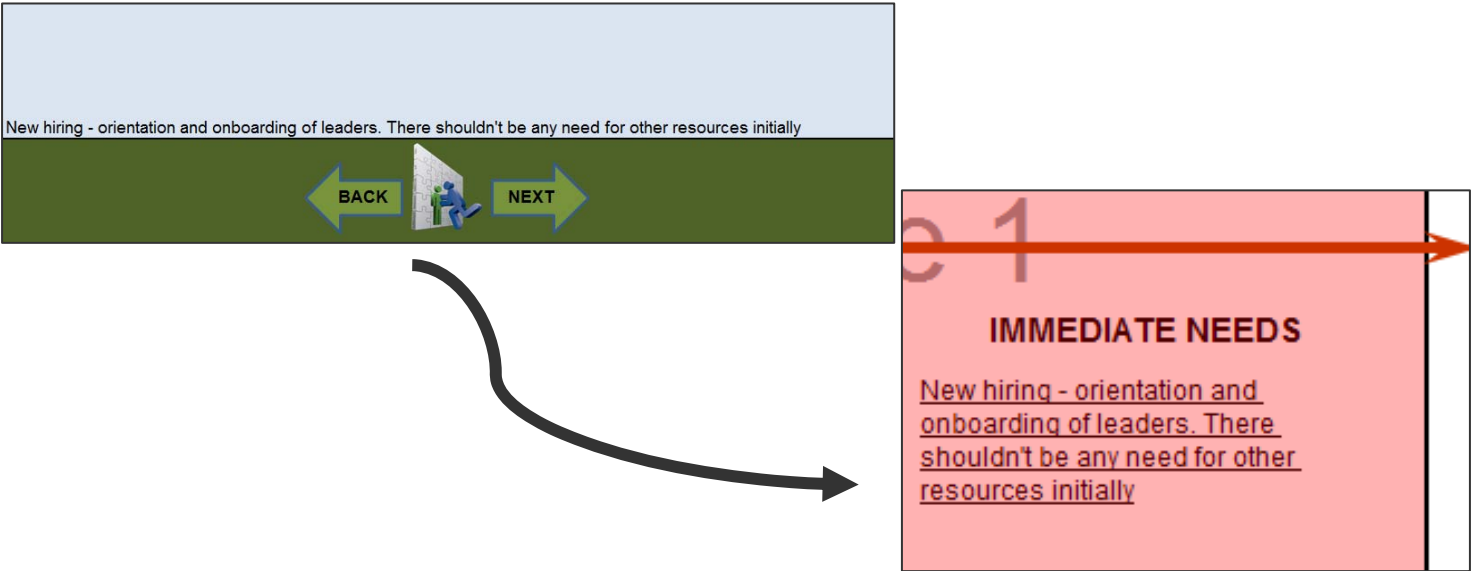
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10 Day Milestone (after the first full two weeks):	12/3/2012
Next 30 Day Milestone (Day 40):	1/2/2013
Next 30 Day Milestone (Day 70):	2/4/2013
Next 30 Day Milestone (Day 100):	3/2/2013
Informal Coaching Meeting Date:	12/15/2012
Informal Coaching Meeting Date:	1/10/2013
Informal Coaching Meeting Date:	2/12/2013
Informal Coaching Meeting Date:	
Informal Coaching Meeting Date:	
Informal Coaching Meeting Date:	
Informal Coaching Meeting Date:	
Informal Coaching Meeting Date:	
Informal Coaching Meeting Date:	



**Follow up Coaching Dates: Enter the projected dates for formal coaching meetings.**

10 Day Milestone (after the first full two weeks): \_\_\_\_\_

Next 30 Day Milestone (Day 40): \_\_\_\_\_

Next 30 Day Milestone (Day 70): \_\_\_\_\_

Next 30 Day Milestone (Day 100): \_\_\_\_\_

**Additional formal/Informal coaching meetings to occur:**


Weekly:

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

<u>People to meet with:</u>	
1	Thomas Walken - VP
2	Suzanne Helt - Director of Region 1
3	Joy Mats - Director
4	Mary Kin - Exec Assistant
5	
<u>Reading Assignments/Video:</u>	
1	Managing "Up"
2	C3 Conversations
3	
4	
5	
<u>Departments to visit:</u>	
1	Supplies
2	Front Desk
3	Transport
4	
5	



**Additional people to meet with:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Reading Assignments/Videos:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Departments to visit:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Appendix – Example Maps

*10 Day Map*

*40 Day Map*

*70 Day Map*

*100 Day Map*

*Roadmap*

# Leadership and Management On-Boarding Roadmap

## INITIAL DIAGNOSIS

Several depts are in a turnaround situation due to previous leadership and will require new appointments and unbalanced attention and leadership. The staff and processes in place are solid, but the outcomes have failed to meet the organizations standards.

## CHALLENGES

Possible backlash or disruptions when new appointments need to be made in the first 90 days. Outcomes have historically fallen short of organization standard and may take time to come up to standards. There are possible outside influences on the productiv



## FIRST 10 DAYS PRIORITIES

Make recommendations of appointment changes in the depts. Beginning interviewing and making new appointments. Report outcome metrics and track progress. Begin rounding and partnering, especially in the depts that need the most immediate attention.

## IMMEDIATE NEEDS

New hiring - orientation and onboarding of leaders. There shouldn't be any need for other resources initially

# Leadership and Management On-Boarding Roadmap

## UPDATED DIAGNOSIS

Half of the appointments have been made to leadership roles in necessary positions.  
There has been significant turnover in two depts, the needs in those depts will need to be monitored. Performance outcomes have not improved yet, but will continue to be m

## CHALLENGES

The new hires/appointments need to be monitored for success in the new roles and that needs to be tied back to performance.

## THE NEXT 30 DAYS PRIORITIES (DAY 40)

Finish new hires and appointments, monitor those hires that have just been done in the last 30 days. Track outcomes for improvement.

## IMMEDIATE NEEDS

New staff hires in key dept roles that have turnover in the last 30 days.



# Leadership and Management On-Boarding Roadmap

## UPDATED DIAGNOSIS

All new hires have been completed for leadership roles.

## CHALLENGES

Track orientation progress of all new hires.

## THE NEXT 30 DAYS PRIORITIES (DAY 70)

New initiative to drive performance in place needs to be tracked and reported back to Sr. Team.

## IMMEDIATE NEEDS

New hires and new software implementation in dept

# Leadership and Management On-Boarding Roadmap

## FINAL DIAGNOSIS

Leadership team for this span of control is set for the next 9 months and outcome targets are also set. There will be some new staff hires in the next 90 days

## CHALLENGES

Lots of orientation for staff and leaders, communication needs to be improved.

## THE NEXT 9 MONTHS PRIORITIES (DAY 100)

Continue software implementation and reporting outcome measures.

## IMMEDIATE NEEDS

Allocation of resources to be determined, set budget.

# Leadership and Management On-Boarding Roadmap

## Assuring Success in the First 100 Days of Appointment

### Stakeholder Reminders to Build Relationships

- My Team: Direct reports and staff
- My Network: VP's, "C" suite, Physicians
- My Peers: Direct and indirect handoffs
- My Customers: Patients and internal

### Performance Outcome Reminders

- Business Practices
- Operational Processes
- Productivity
- Stakeholder/customers
- Financial results

### Leadership Style Reminders

- "Genuine Listening" vs. telling
- Maintain composure
- Don't micro manage - delegate
- "Soften up" intensity
- People before process

### Planning Reminders

- Time Management
- Daily Rounding (all areas)
- Be conscious of \$\$\$
- Coaching vs. "Meetings"

### Hard Target Metric Reminders

- Labor costs in line
- Patient Satisfaction 75th % tile
- Cycle time on throughput #'s
- Quality and Safety measures

"NEW" Leader:

John Doe

