



Healthcare Leadership Training Course

Presented by Ken Hekman and Quinton Friesen

Available in:
French
Portuguese
Spanish

Produced by the US nonprofit Medical Missions for Children, this course is intended to help improve the delivery of healthcare around the world by providing free leadership training to all who work on the front lines of medicine.

Funding provided by The Hilda & Preston Davis Foundation

Curriculum is based on
“Four Essential Disciplines: A Training Guide
for Healthcare Leaders Worldwide”

By Kenneth M. Hekman



**MEDICAL MISSIONS
FOR CHILDREN**

35 Getty Avenue, Building 400
Paterson, NJ 07503 USA
info@mmissions.org | www.mmissions.org
Tel: (973) 754-4960

Upon completion of this course please write or email Medical Missions for Children to request your Healthcare Leadership Certificate of Completion.

Healthcare Leadership Training Course Workbook

BASED ON
“FOUR ESSENTIAL DISCIPLINES,
A TRAINING GUIDE FOR
HEALTHCARE LEADERS WORLDWIDE”

by

Kenneth M. Hekman

First Edition

Copyright © Kenneth M. Hekman

Published by Trillium Arts Press in association with Lulu.com

All rights reserved

First edition printed 2014

Printed in the United States of America

ISBN:

No part of this book may be reproduced or transmitted in any form or by any means, graphic, electronic, or mechanical, including photocopying, recording, taping or by any information storage or retrieval system, without the permission in writing from the publisher.

TABLE OF CONTENTS

Table of Contents.....	3
Introduction.....	4
Presenters.....	5
Module 1: Introduction.....	6
Module 2: Leadership – Scanning.....	8
Module 3: Leadership – Focusing.....	11
Module 4: Leadership – Mobilizing.....	13
Module 5: Leadership – Inspiring.....	15
Module 6: Leadership Conclusion.....	16
Module 7: Management – Planning.....	17
Module 8: Management – Organizing.....	19
Module 9: Management – Implementing and Monitoring.....	20
Module 10: Sustainability – Owning.....	21
Module 11: Sustainability – Tracking.....	22
Module 12: Sustainability – Pricing and Auditing.....	23
Module 13: Service – Preparing and Training.....	24
Module 14: Service – Confirming and Improving.....	25
Module 15: Conclusion of the Course.....	26
Journal Notes.....	28

Introduction

Healthcare organizations play a vital role in every culture. They are places of healing, compassion, and commerce. They are the workrooms for physicians, nurses, and technicians. They provide jobs and are an essential component of every well-rounded community along with schools, businesses and churches.

Hospitals have become known as the technological leaders in the battle against disease. As technology has grown, so have the capital and management requirements for operating them. Physicians initially led healthcare organizations to become places of medical excellence. Now complex healthcare organizations need highly trained business teams with expertise in finance, management, service and professional leadership as well as medicine.

In resource-poor countries, hospitals and other healthcare organizations find themselves overwhelmed with the burden of diseases, including many diseases that are easily preventable. Physicians are often responsible for leadership, but often with little or no business training. They do not have access to specialists with experience in finance, management or service improvement. They struggle to recruit and retain qualified clinical staff. Each day becomes a monumental challenge to find equipment and supplies sufficient to meet the demand. Healthcare leaders have to improvise on a grand scale.

This workbook is designed to accompany the course entitled Four Essential Disciplines designed and produced in collaboration with Medical Missions for Children. Together, we produced a series of videos to train healthcare leaders around the world to increase their capacity for making decisions, leading teams, and planning organizations to improve healthcare delivery. Participants in the course can use this workbook to follow along, and to record insights to enhance their learning experience. The workbook highlights the learning objectives for each module, includes graphics used in the videos, offers space for notes, and identifies additional resources for further study.

I want to thank my colleague, Quinton Friesen, for his excellent assistance in developing and presenting the content for the videos. I also want to thank Frank Brady and Marie Caliendo and the team at Medical Missions for Children. They have done an outstanding job in improving healthcare services around the globe. This effort was supported by grants from multiple foundations committed to healthcare improvement.

PRESENTERS

Kenneth Hekman established The Hekman Group as a healthcare consulting firm in 1990, guided by his passion and intuition to help physicians make wise business decisions. He is also committed to bringing wise leadership practices to healthcare organizations in developing countries, and has personally served over 500 healthcare organizations on five continents with a distinctive blend of organizational development insights and visionary leadership. He helps physicians and healthcare leaders discern their business opportunities and develop sustainable strategies through technical analysis, honest reflection and consensus building. He functions as an organizational anthropologist, dissecting and building a culture of performance. He enjoys difficult challenges and the opportunity to make a difference in the quality of life for those in complex and demanding conditions.

Mr. Hekman is the author of six books in healthcare management. A continuous learner, Ken holds an MBA in marketing and business strategy, and is a Fellow in the American College of Medical Practice Executives.

Quinton Friesen is a seasoned healthcare executive working over four decades in leadership roles with both community hospitals and university-based training institutions. During his career he led the construction team building a replacement hospital as well as leading several other major construction projects. During his tenure the organization received numerous patient satisfaction awards as the hospital ranked in the 99th percentile nationally. After retiring, Quinton and his wife, Gail, joined an international mission providing healthcare consulting and leadership training programs. He has led international leadership training programs in West Africa, South Pacific, and Latin America. He has also served as adjunct faculty for colleges and universities at both undergraduate and graduate levels.

MODULE 1: INTRODUCTION

Learning Objectives

In this introduction module, our objectives are that you will:

- Understand the purposes of healthcare organizations,
- Recognize the marks of successful healthcare organizations,
- Understand the roles of leaders and managers in healthcare organizations,
- Appreciate the challenges physicians face as they move into leadership roles.

Course Outline

Leadership

- Scanning
- Focusing
- Mobilizing
- Inspiring

Management

- Planning
- Organizing
- Implementing
- Monitoring

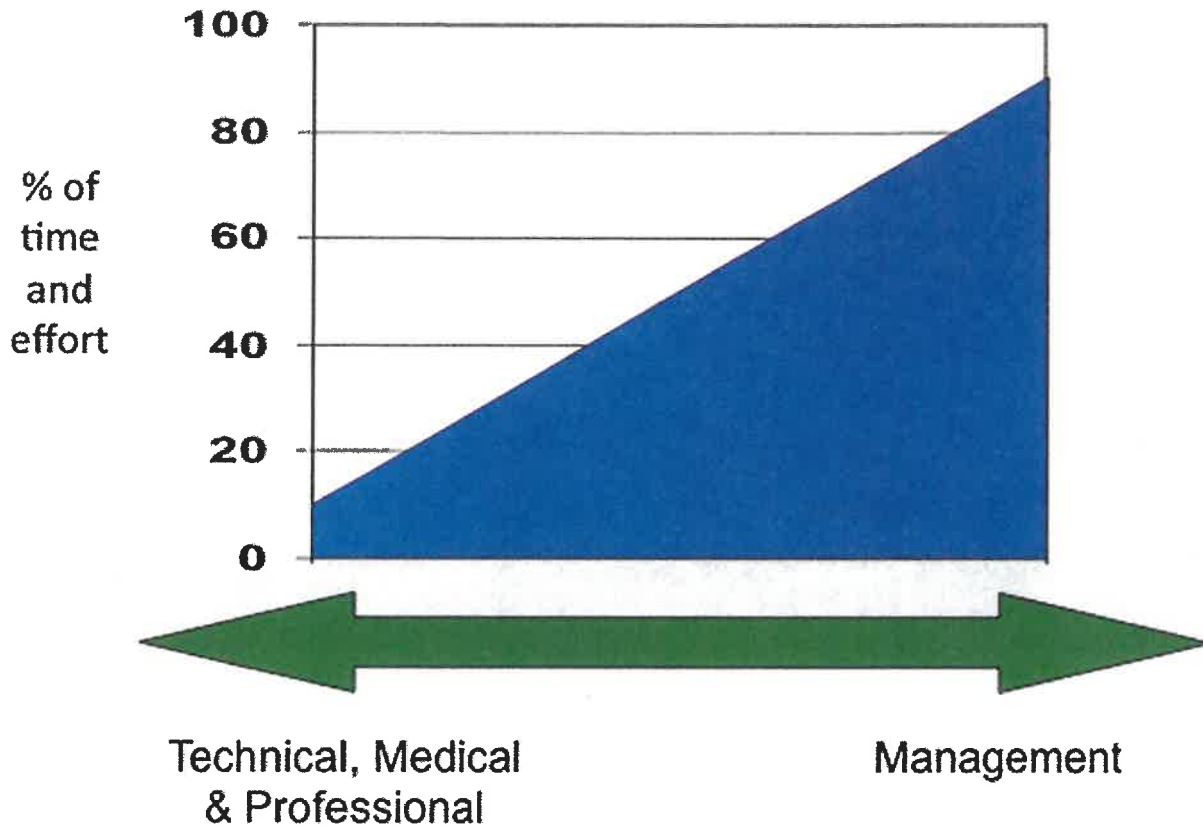
Service

- Preparing
- Training
- Confirming
- Improving

Sustainability

- Owning
- Tracking
- Pricing
- Auditing

Growing into Leadership and Management



Questions about Leadership and Management

1. Can leadership and management skills be learned?
2. How can I assess and improve my skills for leadership and management?

Case Study

Dr. C is an excellent surgeon, admired and trusted by everyone. You have been asked to comment about his readiness to become the leader of the hospital.

1. What qualities of Dr. C. would you identify as most valuable for his new role?
2. What might limit his effectiveness?
3. What would you recommend he learn in the early stages to increase his leadership effectiveness?

Module 2: Leadership – Scanning

Learning Objectives

At the end of the session, we hope that you will be able to:

- conduct internal and external needs assessments
- be able to identify market changes that will impact decisions in your healthcare organization
- identify sources of information to guide the adoption of best practices in healthcare management
- recognize the relationship between self management and leadership effectiveness in the healthcare organization

Community (External) Needs Assessment

Customer Group	Needs	Expectations
Patients		
Family Members of Patients		
Owners (Government Officials, Investors)		
People in the Community (Future Patients)		
Staff		

SWOT Analysis (Internal Needs Assessment)

Strengths

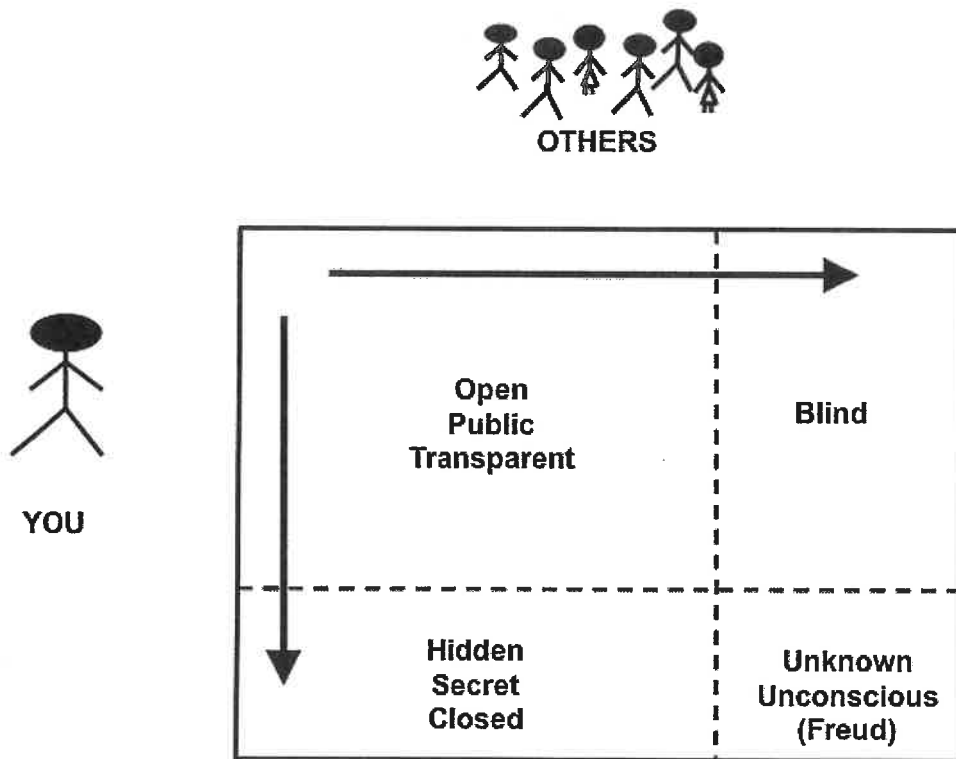
Weaknesses

Opportunities

Threats



Johari Window



Common Questions about Scanning

1. People are constantly changing, so how can we really know what the community is expecting of us?
2. How relevant are best practices from another culture?
3. If I'm already in a position of authority, why should I increase my self-awareness?

Exercise: Assemble your management team and conduct an internal SWOT analysis.

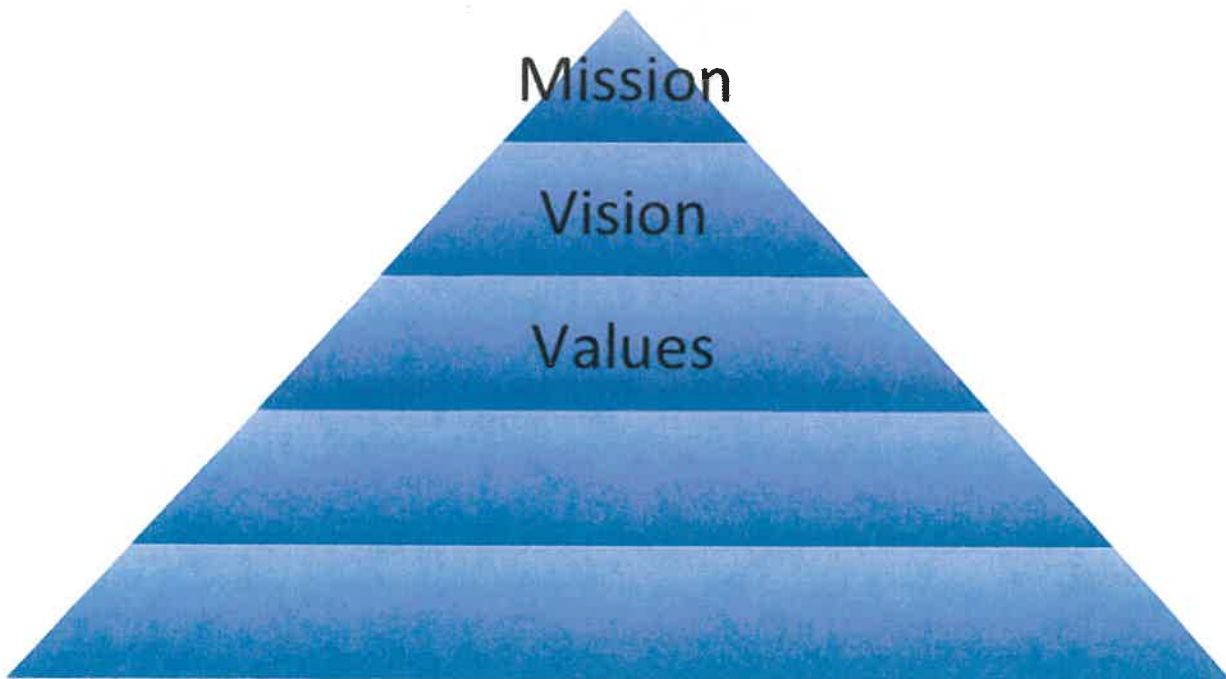
MODULE 3: LEADERSHIP – FOCUSING

Learning Objectives

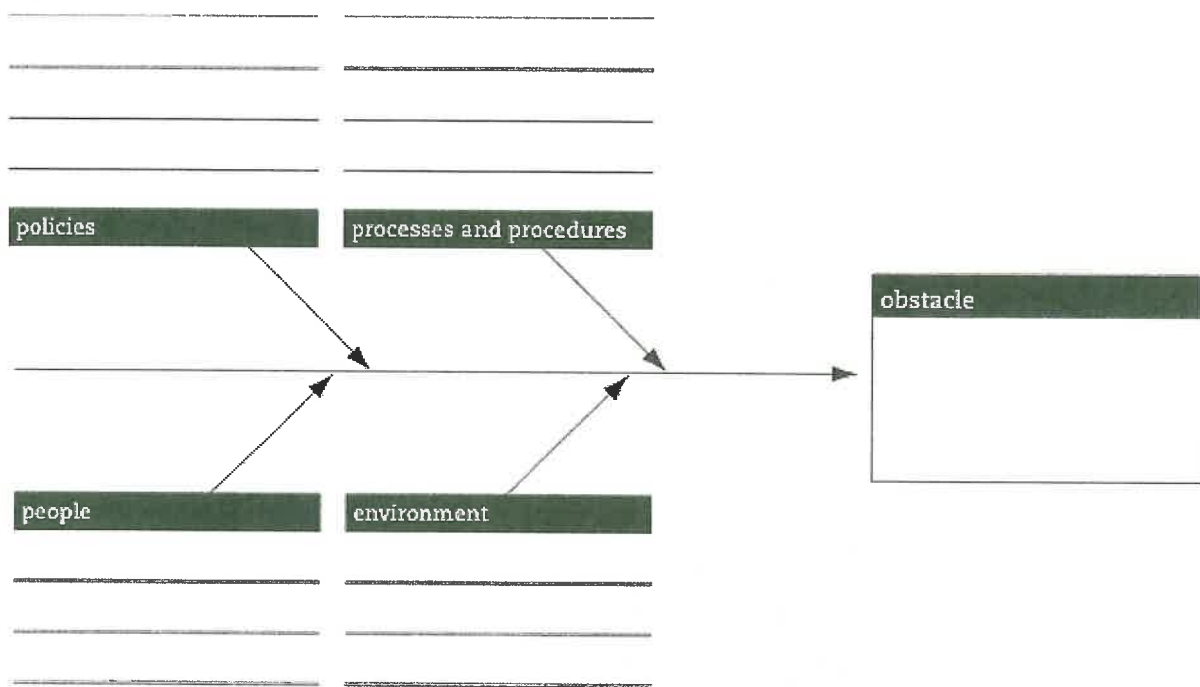
In this module, we have the following learning objectives:

1. To introduce the concept of mission, vision, values and to define those terms with illustrations.
2. How to identify organizational issues and challenges; to determine techniques that can be used to assess issues facing an organization.
3. Time management - to understand the difference between important and urgent.
4. Strategize - to understand techniques to take action moving the organization forward.

Mission, Vision and Values Diagram



Fishbone Diagram



Common Questions on Focusing

1. Our mission, vision and values don't seem to be reflected in our organization's performance. How do we reconnect them?
2. My work is unpredictable and constantly interrupted. How can I manage my time with so many interruptions?

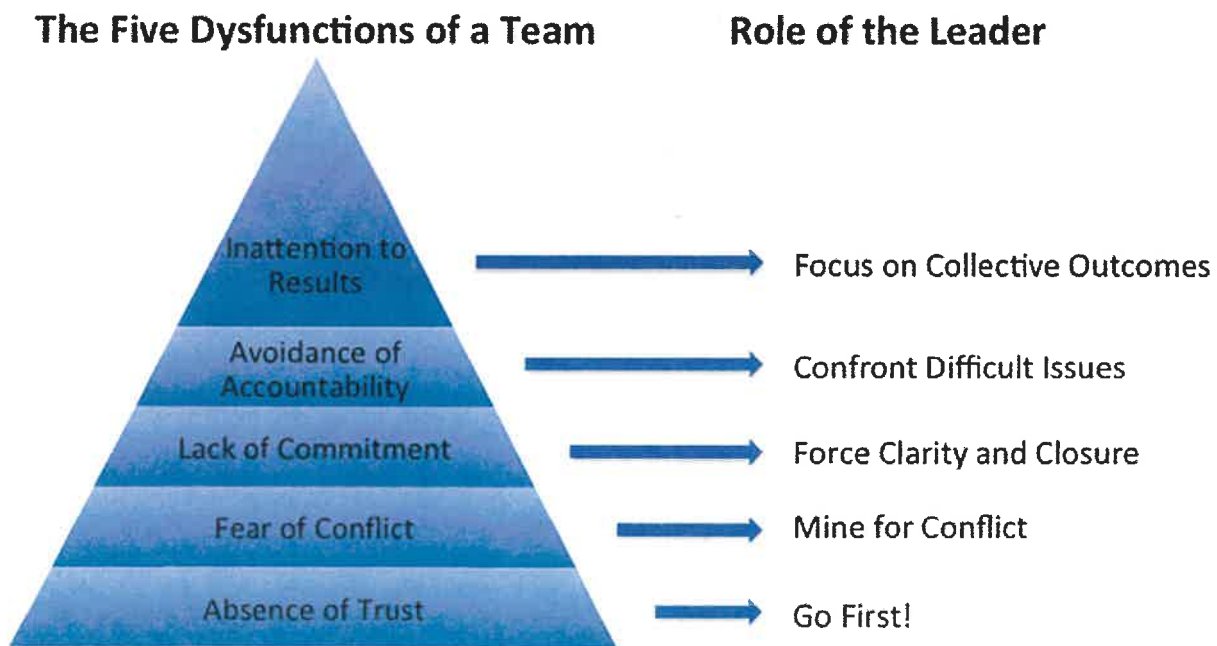
MODULE 4: LEADERSHIP – MOBILIZING

Learning Objectives

We have three learning objectives in this module:

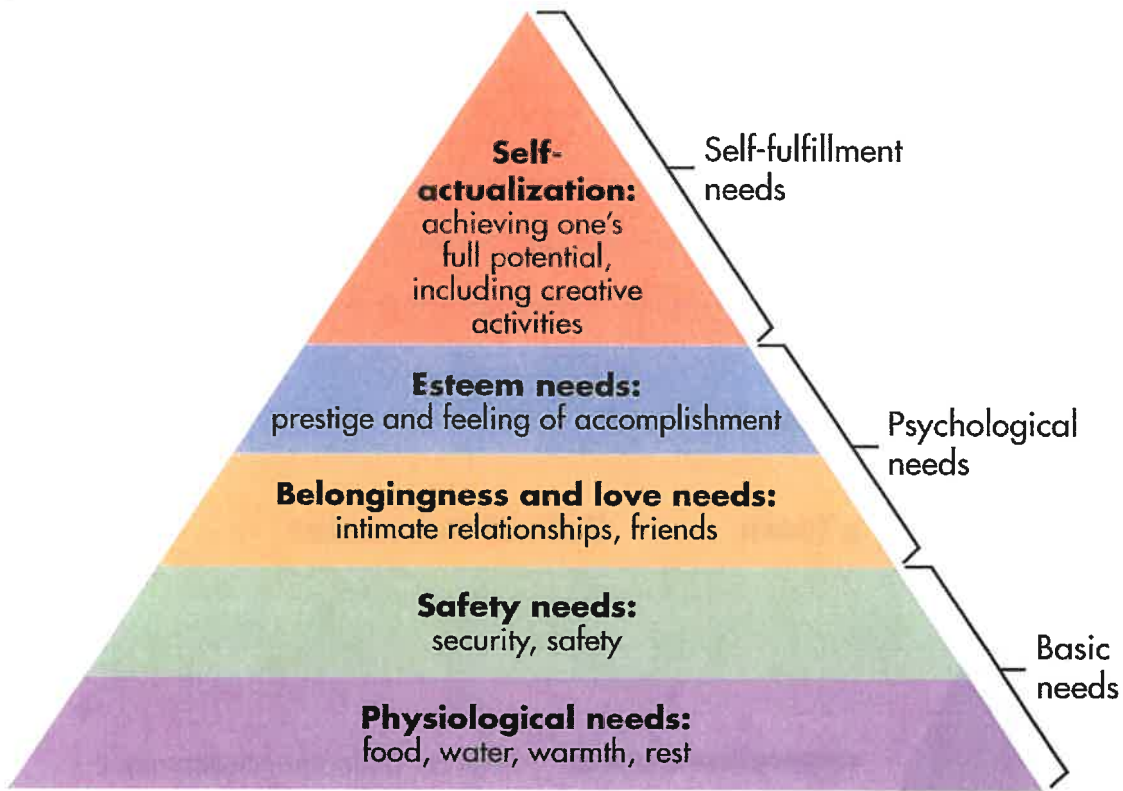
- We will begin by looking at why teams are essential for healthcare organizations.
- We will talk about why it is difficult to work in teams, and identify the five main functions of teams.
- We will explore how leaders can motivate people by aligning rewards with basic human needs.

Dysfunctions of Teams and Role of the Leader



Adapted from The Advantage by Patrick Lencioni

Maslow's Hierarchy of Needs



Common Questions about Motivating

1. How can managers change people's attitudes?
2. What can a manager do to unite highly independent physicians?
3. What do you do when rewards have no effect?

Case study

Imagine that your cardiologists don't get along with your cardiovascular surgeons.

1. What can you do as a leader to mobilize and motivate them to collaborate?
2. What risks might you find with each possible intervention?

Module 5: Leadership – Inspiring

Learning Objectives

In this session we will talk about four aspects of inspirational leadership.

1. We will recognize the central importance of trust as a leadership tool, and how actions and words can build trust (and destroy it just as easily).
2. We will appreciate the connection between leadership, integrity, and leader effectiveness.
3. We will point out how a leader shape the culture of the organization by the way he or she treats people.
4. We will understand the importance of continuous professional development in leadership.

Four Stages of Delegation

1. Research the problem and tell me what you found.
2. Research the problem and give me your recommendations.
3. Solve the problem and tell me how you solved it.
4. Just solve the problem. I don't need to know how you did it.

Common Questions about Inspiring

1. My personality just isn't charismatic. How can I inspire people when it seems inconsistent with who I am?
2. If I delegate tasks to my team, won't my boss start to wonder why he needs me?

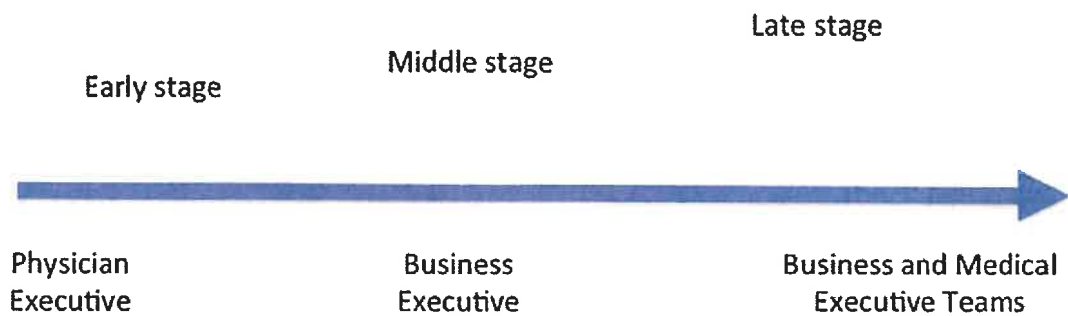
Module 6: Leadership Conclusion

Learning Objectives

In this module, we will:

- Explore the unique role healthcare leaders play in society
- Learn how to create a learning plan for continuous professional development, and
- Examine what it means to lead from within

Past, Present, and Future of Healthcare Leadership



Resources

- American College of Healthcare Executives (ache.org)
- Medical Group Management Association (mgma.com)
- International Hospital Federation (ihf-fih.org)
- Leadership From The Inside Out, Kevin Cashman

Discussion Questions about Leadership

- How does the character of a leader impact their effectiveness?
- What should a community expect about the integrity of their healthcare leaders?
- When is authenticity important for healthcare leaders?

Common Questions about Leadership

1. Why is leadership so important?
2. How does a leader's beliefs, values, and self-knowledge impact their effectiveness?
3. How do the best leaders distinguish themselves?

Application Questions

- What are 3 things you learned about leadership?
- What are 2 questions you would like to learn more about?
- What is 1 thing you are going to change in your practice as a result of what you have learned?

MODULE 7: MANAGEMENT – PLANNING

Learning Objectives

Our learning objectives for this session are:

- Understand five steps to developing an organizational plan.
- Know various techniques to gain planning information.
- Know how to assess your organization's condition.
- Understand the synergy of mission, vision, values, and goals
- Be able to write "SMART" goals.

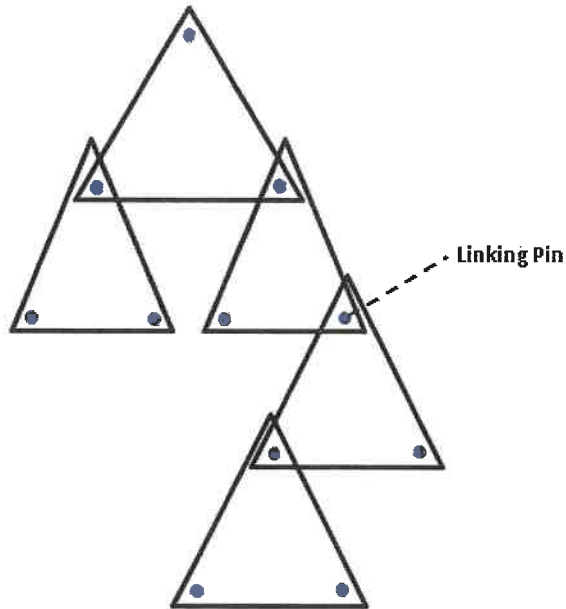
SMART Goals

1. Specific
2. Measureable
3. Attainable
4. Realistic
5. Timely

Mission, Vision, Values, and Goals Diagram



Linking Pin Organization



Common Questions about Planning

1. We can't get accurate data from our government or other sources to help us plan based on community needs. Where can we start?
2. We have tried to set goals in the past, but they usually get changed because of unexpected challenges. How can we make goals that can make a difference?

Module 8: Management – Organizing

Learning Objectives

In this module, our learning objectives are to:

- Understand the basic design qualities for efficient and effective organizational structures
- Begin to discern workforce requirements and selection techniques
- Understand how to build job descriptions and work standards for organizational achievement

Common Questions about Organizing

1. Why do we need organizational charts when everyone already knows their job?
2. Isn't it more efficient to just go to the top when I see a problem that needs to be fixed?

Exercise

Draw an organizational chart of your organization and critique it with questions like these:

- Is the span of control reasonable?
- How can the decision-making process be simplified?
- Are reporting relationships clear and logical?

MODULE 9: MANAGEMENT – IMPLEMENTING AND MONITORING

Learning Objectives

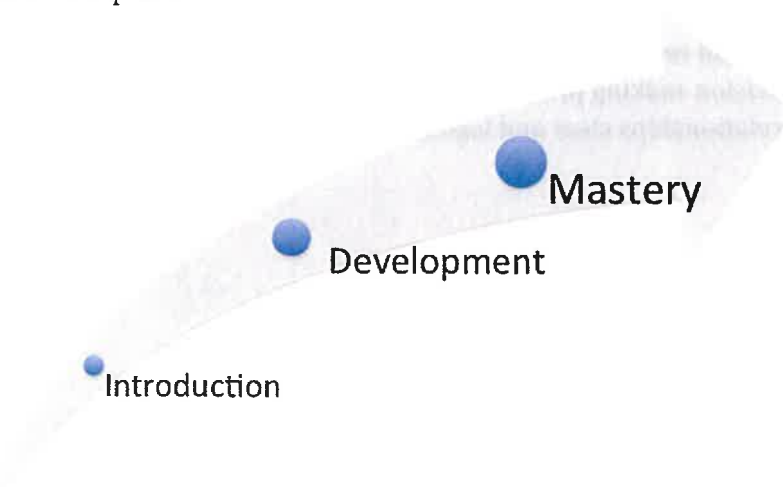
Here are our learning objectives for this module:

- Our goal is that you will discern how policies, systems, and procedures work together to achieve organizational consistency.
- You will learn about work plans, key performance indicators, and dashboards for monitoring progress.
- You'll recognize how changing expectations in both external and internal markets feed the need for continuous improvement.

Work Plan Format

Task	Who is responsible	Deliverable	Deadline

Continuous Professional Development



Common Questions about Implementing and Monitoring

1. Policies and procedures don't seem to change anything. Why do we need them?
2. How can I find the best key performance indicators?
3. Why do we have to constantly change the way we do things, even when they seem to be working well?

MODULE 10: SUSTAINABILITY – OWNING

Learning Objectives

Our learning objectives in this module are:

- that participants will recognize the importance of personal and corporate responsibility for achieving sustainability
- that you will understand the stages of organizational development required to achieve sustainability
- and that you will use market expectations to guide sustainability strategies

Common Questions about Owning

1. Our culture has depended on the generosity of others for generations. How can we change that?
2. Why do government hospitals need to be concerned about sustainability?

Case Study

Your clinic was initially built with donations from other countries, but the facilities are getting too small, and are in need of repair.

1. What steps can you take to assure the future of the clinic?
2. Which of those steps require changes in thinking, and which require changes in processes?

MODULE 11: SUSTAINABILITY – TRACKING

Learning Objectives

Participants will:

- Identify the components of a balance sheet
- Identify the components of a income and expense report
- Discern steps to assemble a financial plan
- Understand how managers control budgets

Components of Financial Statements

Balance Sheet: Photo

- **Assets:** What you own
- **Liabilities:** What you owe
- **Equity:** What you own free and clear

Income Statement: Video

- **Income:** What comes in
- **Expense:** What goes out
- **Profit:** What's left

Common Questions about Tracking

1. Why do leaders and managers need to track financial results? Isn't that the job of the finance department?
2. This sounds like a complex process, requiring expensive computers, software, and specialized knowledge. How would this be relevant for a small clinic in a remote area?

MODULE 12: SUSTAINABILITY – PRICING AND AUDITING

Learning Objectives

Participants will:

- Understand the relationships between prices, costs and value to consumers for healthcare services
- Recognize when and how to apply discounting strategies in healthcare organizations
- Examine techniques for tracking cash flow and financial decisions made inside the organization
- Understand when external audits are valuable, and how to select an appropriate external auditor
- Appreciate how leadership integrity and transparency impact long term organizational sustainability

Components of Cost: Financial Planning Model



Common Questions about Pricing and Auditing

1. Everyone in our community is poor. How can we become sustainable?
2. We trust each other, so why do we need auditing?

Exercise

Design a sliding scale fee structure for a clinic to increase access to care in a poor community near you.

Module 13: Service – Preparing and Training

Learning Objectives

Participants will:

- Learn how market expectations impact healthcare organizations
- Outline standards for service excellence
- Apply market expectations to facilities, equipment, staffing levels, and staff qualifications
- Discern staff training needs in the healthcare organization, and techniques for effective skill development
- Resolve service issues in real time at all levels

Common Questions about Preparing and Training

1. Everyone knows what is expected of them, so why do we have to train our staff how to serve people?
2. Healthcare organizations are unique. Why should we compare their service with other kinds of businesses?

Discussion Questions

- What organizations in your community have the best reputations for service?
- How might their service standards shape expectations that patients and their families will have for our healthcare organization?
- How can we help our staff recognize a service problem when it happens, and resolve it quickly?

MODULE 14: SERVICE – CONFIRMING AND IMPROVING

Learning Objectives

Participants will:

- Measure compliance with service standards
- Help the organization learn from its mistakes.
- Help individual employees improve their service attitudes and behaviors.
- Scan changing expectations about service standards.
- Brainstorm new service options

Service Excellence Questions

1. During this hospital stay, how often did nurses treat you with courtesy and respect?
2. During this hospital stay, how often did doctors treat you with courtesy and respect?
3. During this hospital stay, how often was the area around your room quiet at night?
4. During this hospital stay, how often did the hospital staff do everything they could to help you with your pain?
5. Using any number from 0 to 10, where 0 is the worst hospital possible and 10 is the best hospital possible, what number would you use to rate this hospital during your stay?

Common Questions about Confirming and Improving Service

1. Good service is not highly valued in our community, and people even become suspicious if they are treated as though they are special. Won't they distrust us if we raise the service standards in our healthcare organization?
2. What can I do about highly competent and productive physicians who are rude to patients?

MODULE 15: CONCLUSION OF THE COURSE

Learning Objectives

- Review of the four disciplines
- Putting it all together – The Stellar Performance Model
- Creating your own continuous professional development plan

Course Outline

Leadership

- Scanning
- Focusing
- Mobilizing
- Inspiring

Management

- Planning
- Organizing
- Implementing
- Monitoring

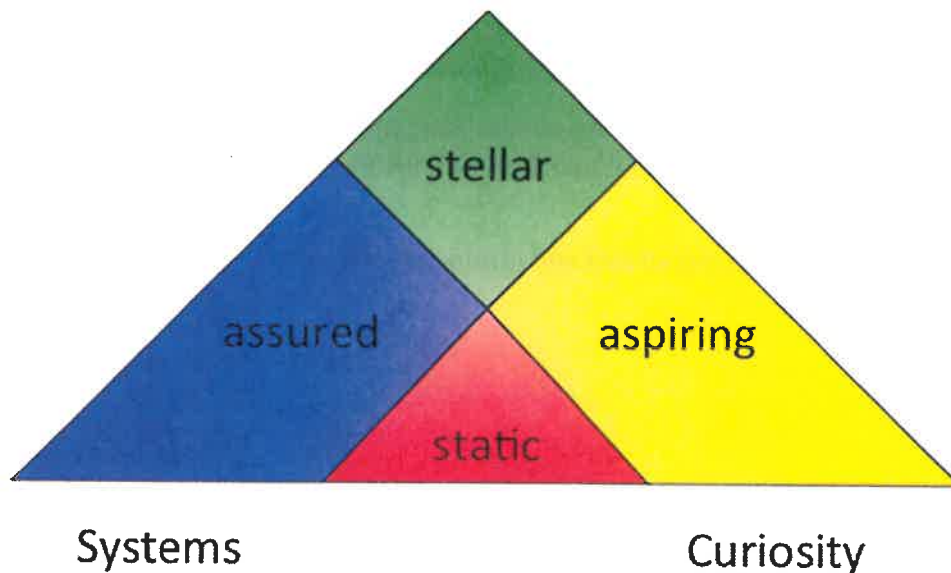
Service

- Preparing
- Training
- Confirming
- Improving

Sustainability

- Owning
- Tracking
- Pricing
- Auditing

Stellar Performance Model



Copyright 1996-2014 The Hekman Group

Continuous Professional Development Resources for Individuals

- Self-assessments
- Reflection
- Journaling/logbooks
- Blogs
- MOOCs
- Books
- Journals
- YouTube
- TED talks
- Conferences
- Webinars
- LinkedIn
- Other social media
- Writing

Continuous Professional Development Resources for Groups

- Quality circles
- 360 assessments
- Book clubs
- Journal clubs
- Special interest groups
- Internal training
- Special speakers
- Lead a meeting

JOURNAL NOTES