

# Customer Case Study

## Client/Organization:

Health Care Organization

## The Challenge:

This federally funded public health clinic came to us looking for leadership development for their senior team. They found us through a referral from a prior participant. The clinic had completed an internal employee survey that netted some very inconsistent results between the leadership team and the level just under them, and they wanted more data and confirmation of their next steps. They wanted to become better communicators. The worst ratings on their survey came from the actual providers, front line to the patients.

## Solution Milestones:

We started the process by coaching the executive director to bring her up to speed on what the rest of her team would be experiencing. We next administered D.I.A.L.O.G. to develop a baseline, and then followed up with Executive Leadership for the senior team. The Attribute Index was administered to each participant with a one-on-one debrief. It was used just before the Team Building and Collaboration sections of the Executive Leadership process. We've seen the value of at least one individual session with each participant somewhere in the process. It helps to have the concentrated time to deal with personal issues that may not have come to light in the group setting.

## Results/Outcomes:

They are definitely communicating with one another more and are on the same page with providing the right care for the patients. The process also helped the executive director to identify who their outstanding performers were and who was struggling. The process took issues that were underground and brought them to the surface. They are now getting ready to reorganize. They plan to shift people on the team who possess the appropriate skills in the right job, while giving them the opportunity to identify their weaknesses and improve their skills. Most ideas stem around an issue from the Attribute Index debrief: "Based on your scores, here's how you should watch out when you're interacting with your staff."

## Follow-Up/Sustainability:

Those that were identified as struggling were given some one-on-one coaching sessions to help them improve and some cases even save their role on the executive team. They also realized that in order to help their people perform better, they needed to work on some of their key processes. In September, they will begin CTR for their billing processes, and lay the groundwork for taking their charts and forms electronic. This will impact their chart management, the quality of patient care and their risk management figures.