



Session One

Leading Home Care: The Top Ten Characteristics of Highly Effective Home Care Leaders and Characteristic Number One: Seeing the Bigger Picture

- ◆ **The Most Important Characteristics of Home Care Managers**
- ◆ **Leadership Versus Management**
- ◆ **Which Characteristics Would You Like to Develop?**
- ◆ **A Model of Strategic Thinking**
- ◆ **Assessing Your Current Reality**
- ◆ **The Forces and Trends Shaping the Future of Home Care**
- ◆ **What is Home Care?**
- ◆ **The Business of Home Care**
- ◆ **Your Desired Future**
- ◆ **Crafting Your Uniqueness**
- ◆ **Revving Up Your Economic Engine**
- ◆ **Measuring Your Results**

**November 20, 2003
1:00 - 2:30 p.m. Eastern Time**



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Leading Home Care: The Top Ten Characteristics of Highly Effective Home Care Leaders

Who is the *most competent manager* you know in home care? What are the important characteristics that make that person the most competent? What characteristics would you most like to develop in your middle and upper level managers?

These are the questions we asked dozens of top home care executives across the country in our efforts to understand what makes great leaders in home care.

We estimate that more than 100,000 executives, managers, supervisors and team leaders are working to provide guidance and leadership to over 600,000 home care workers.

The Home Care Leadership Academy is designed to create a clearer understanding of the skills and competencies that are demonstrated by the most effective of those 100,000 leaders. It is our attempt to address what we believe is the next major issue facing home care in America... *the need to develop the next generation of home care leaders.*

Home care is the smallest, but fastest growing segment of healthcare in America. In 1997, over 10,000 Medicare certified home health agencies provided more than 300 million visits to nearly 4 million beneficiaries of Medicare, Medicaid, and private health plans. Another 10,000 agencies provided a variety of paraprofessional and support services to frail elderly and disabled Americans through Medicaid waiver, other government funded services, and private pay programs. In all, over 7 million people received more than \$47 billion in home care services.

Although home care was the fastest growing segment of healthcare throughout the early 90s, many agencies were severely impacted by the Balanced Budget Act of 1997 and Medicare's Interim Payment System. In an effort to control costs and remain financially viable, home health agencies had to cut costs dramatically, and those cuts often meant reducing



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the numbers of people. In many agencies, the cuts came at the middle and upper management levels. That meant that many agencies, already starved for enough competent leaders, were facing real shortages of leadership.

The home care industry is now rebounding. As companies grow and as more home care companies are created, the need for competent leaders will grow dramatically. This is your opportunity to move forward in your career by developing the knowledge, skills, and attitudes to take your leadership skills to the next higher level.

The Most Competent Managers in Home Care

To better understand the characteristics of highly competent managers in home care, we sent a short survey to about 200 of our friends and colleagues around the country. Thirty-one executives responded. Here is what they said:

The typical *most competent manager* in home care is a vice president, director of operations or director of clinical programs. He or she is 46 years old, has a master's degree in nursing or business, has worked in home care for 16 years and has been with their current agency for 12 years. Other positions mentioned in our survey were CEO, COO, CFO and Board member. Sixty five percent of the managers have a master's degree, and 27 percent have a BSN.



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The Most Important Characteristics of Home Care Managers

We asked the survey respondents to tell us the three most important characteristics of the person they identified as the *most competent manager*. We received a list of 44 different characteristics. The ten most frequently mentioned characteristics were:

1. Sees the big picture
2. Is a clear communicator
3. Recruits good people
4. Demonstrates enthusiasm and a sense of humor
5. Is decisive
6. Motivates and inspires others
7. Is well organized
8. Clearly articulates a vision for the future
9. Is eager to learn
10. Demonstrates a high level of honesty and integrity.

As we reviewed this top ten list, it became clear that these are leadership characteristics rather than management skills.

Leadership Versus Management

In our work with hundreds of healthcare organizations and thousands of executives and managers over the past 25 years, we have developed a clear distinction between leadership and management.

In her book, *The Heart of Leadership*, Elizabeth Jeffries, RN, CSP, CPAE, says, “Leadership is the process of influencing others. It is about establishing direction, aligning people to move in that direction, motivating and inspiring people. It is about serving, and it produces long-term change.

Management is about the tools and techniques to make an organization run. It is tasks, structures, and systems. Management is about budgets, performance indicators, charts, scheduling, and financial reports.



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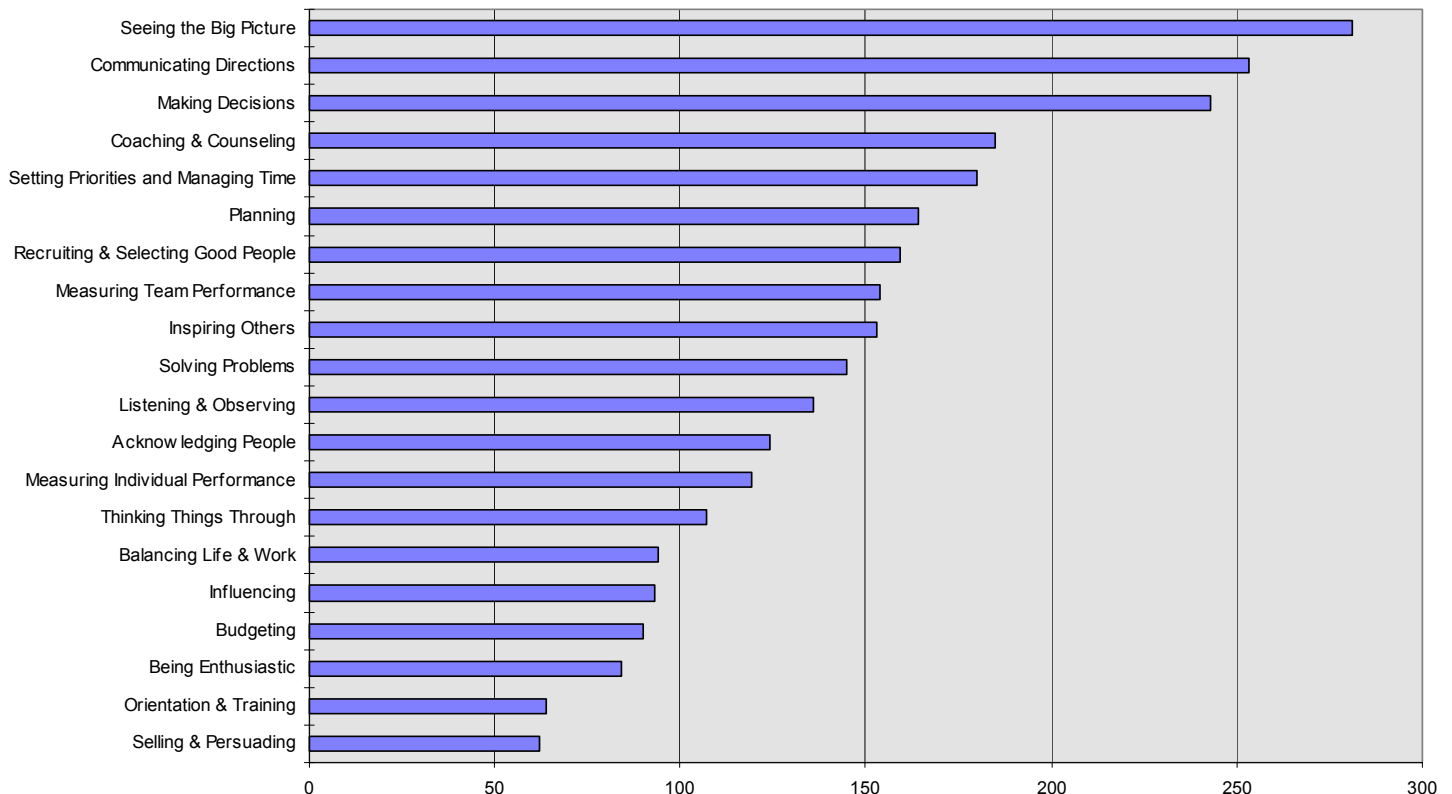
Management is about predictability, order, control and problem solving. Management produces short term results.”

Although management skills are very important to the operation of an effective home health agency, it is clear from our survey that home care executives value leadership characteristics more than management techniques.

Which Characteristics Would You Like to Develop?

In order to address the coming *Leadership Crisis*, we asked our colleagues to tell us what characteristics they would most like to develop in their middle and upper level managers. We gave them a list of 20 characteristics, and asked them to use a 100 point rating system to assign priorities. The chart below shows the list in the order of importance.

Homecare Leadership Characteristics





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1. Seeing the Bigger Picture

By a significant amount, our survey respondents said that the most important characteristic they want to develop in their managers is the ability to *see the bigger picture*. To us, that means understanding the forces and trends shaping the future of healthcare. It means home care leaders need to become familiar with the economic, demographic, technological and political forces affecting this segment of healthcare.

2. Clearly Communicating Directions and Expectations

Home care leaders need to clearly define the direction of the agency, and their expectations for performance and behavior. Then they need to clearly communicate the direction and expectations through written and oral methods.

3. Making Decisions

Home care leaders need to develop the ability to make choices between a variety of options. These decisions need to be consistent, and in alignment with the agency's mission, values, and strategic direction. Decisions need to be clearly communicated, action taken to implement the decision, and people held accountable for their actions.

4. Coaching and Counseling

Home care leaders need to develop the ability to provide one-on-one guidance, direction, and teaching to their people. They need to be cheerleaders and observers. They need to develop the ability to counsel employees who are having performance or behavior problems.

5. Setting Priorities and Managing Time

Home care leaders need to have a clear sense of what is important, where to devote their time and resources, and how to communicate priorities to others. Priorities and time allocation need to be aligned with corporate strategies, goals, and objectives.



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6. Planning

Home care leaders need to develop the skills of determining direction, setting goals and objectives, developing action steps, assigning responsibility, and determining target dates. Leaders need to clearly communicate their plans, take action, and hold people accountable for results.

7. Recruiting and Selecting Good People

Home care is a people intensive business. Those leaders who are able to attract and retain the best people will be most effective. Those agencies that can create Strategic Recruiting Advantage will be able to gain Strategic Competitive Advantage in the marketplace. Home care leaders need to develop skills in recruiting and selecting good people.

8. Measuring Team Performance

We have a saying... “What gets measured gets managed. What gets rewarded gets repeated.” An important skill for home care leaders is the ability to establish the critical measures of team success, gather data to measure performance, and communicate the results to team members.

9. Inspiring Others

Home care leaders need to develop a communication style that enables them to inspire others to follow. There are no leaders without followers, and the best leaders have willing, enthusiastic followers who are inspired to take action in alignment with the leader’s direction.

10. Solving Problems

Home care leaders need to have the skills and confidence to address problems that come up, gather information, find the cause, develop solutions, make decisions and take action quickly and effectively. Research in customer service shows that the number of problems that occur



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The Forces and Trends Shaping the Future of Home Care

Forces: Those pressures that cause Change

Trends: The patterns of change caused by the Forces.

There are five major forces affecting the future of home care. They are:

1. Economic forces
2. Demographic changes
3. Consumer choice
4. Technology
5. Political change

We will have an indepth discussion of the forces and trends shaping the future of home care in our next teleseminar, or December 18, 2003 at 1:00 p.m. Eastern Time. Be sure to join us then for this indepth discussion.



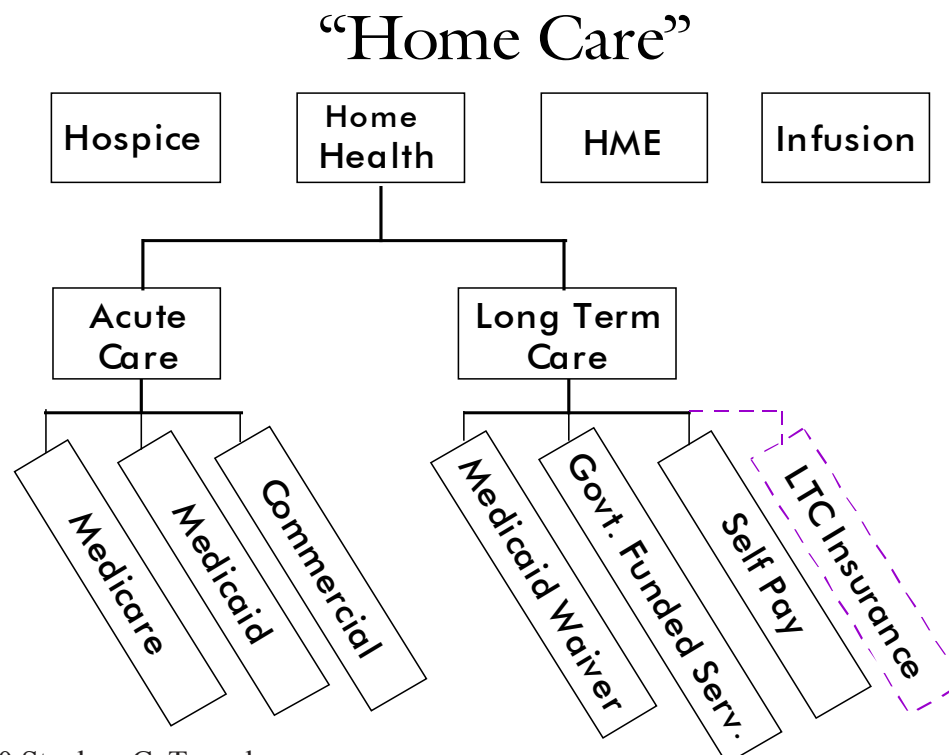
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What is Home Care?

As a leader in home care, it's probably a great idea for you to be able to provide a clear, concise answer to the question, "What is home care?"

The Council on Scientific Affairs of the American Medical Association defines home care as "the provision of equipment and services to the patient in the home for the purpose of restoring and maintaining his or her maximum level of comfort, function, and health. Medical care at home can be preventive, diagnostic, therapeutic, rehabilitative, or long-term maintenance care". In addition, the Medicare Payment Advisory Commission notes that individuals eligible for Medicare reimbursed home healthcare may receive a number of services, including "occupational therapy, medical social services, and home health aide care on a part-time or intermittent basis."

To get a clearer big-picture look at home care, let's look at a diagram which shows the four basic services covered under our definition of home care, and some sub-systems within these basic services.



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Your Desired Future

Highly effective home care leaders are visionaries who have the ability to see a possible and desirable future. They communicate their vision for the future and inspire others to follow them. What is your desired future?

There are three parts of defining your desired future:

Mission

Mission is purpose plus action. It is why we exist. It is the “why” that helps us put up with the “what.”

What is your company mission?

What is your personal mission?

Vision

Vision is a clear mental picture of a possible and desirable future. It is a consciously created fantasy of what we aspire to be.

What is the vision of your company?

What is your personal vision?

Values

Values are the core beliefs that guide our thoughts and actions; our guiding philosophy.

What are the values of your company?

What are the core values that guide your thoughts and actions?



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Crafting your Uniqueness

In order to grow your home care business, you need to create competitive advantage in your marketplace. To do that, you need to be different from your competitors.

Walt Disney, the creator of Mickey Mouse and Walt Disney World once said, "To be successful in business you must be unique. You must be so different that if people want what you have, they must come to you to get it."

What makes your home care company different from other home care companies in your community?

What are you doing to create and communicate your uniqueness?



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Revvng up your Economic Engine

We have a saying in our company:

“You must first do well before you can do good!”

What does that mean to you?

To us, it means that we must have a financially viable business that is able to survive and prosper over the long term in order to do good for our patients, our customers, our employees, and our community.

Revenue is the fuel that runs your economic engine.

What are the sources of revenue for your agency?

What can you do in your leadership position to help increase revenue?



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What Gets Measured Get Managed

We have another saying in our company:

“What gets measured gets managed. What gets rewarded gets repeated.”

As a leader, you communicate what is important by what you pay attention to. There is no better way to show what you are paying attention to than to measure it. What are the key indicators that measure the success of your area of responsibility? We call those your **Critical Measures of Success**.

You will be more effective as a leader when you develop a strategic scorecard to show the results on a monthly basis of your **Critical Measures of Success**.

Make a list of the key quantitative indicators that you would use to measure the success of your area of responsibility:



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Discussion Questions

1. What can we do to refine, communicate, and live our Mission?
2. What can we do to communicate and live our Values?
3. What makes us unique in our marketplace? How can we gain and sustain competitive advantage over the other home care companies in our community?
4. What can we do to increase our revenue in order to fuel our economic engine?

Field Work Assignment:

Make a list of the trends you see that are shaping the future of home care in America. Look up whatever information you can find on those trends. Be prepared to discuss the trends at our next teleseminar on December 18, 2003.



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The Leadership Academy Teleseminar Series

You are participating in a unique learning experience. There is no place else in the world where you can experience the interactive discussion of the top ten characteristics of highly effective home care leaders from the comfort of your own conference room.

Be sure to participate in all eight of the teleseminars in this series:

Schedule and Topics: (All times 1:00 - 2:30 p.m. Eastern)

November 20, 2003 - Seeing the Bigger Picture

December 18, 2003 - Forces & Trends Shaping the Future of Home Care

January 22, 2004 - Strategic and Operational Planning

February 19, 2004 - Setting Priorities & Managing Time

March 18, 2004 - Problem Solving & Decision Making

April 15, 2004 - Finding and Keeping Great People

May 20, 2004 - Inspiring Others to Follow YOU

June 17, 2004 - Managing Team Performance

If you are unable to attend any of the live teleseminars, be sure to ask for a copy of the audio CD recording that you can listen to at your convenience. Each teleseminar is recorded live and an audio CD is provided as part of your registration fee.



About your Leadership Academy Teleseminar Team

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For the past 20 years, **Stephen Tweed** has worked with home care companies around the country that want to grow their businesses, and with home care leaders who want to multiply performance. He is currently Chairman and CEO of *Leading Home Care... a Tweed Jeffries company*, the center for home care strategy and leadership.

Stephen has served on the Boards of Directors of three different home care companies, and as the Interim President and CEO of a \$25 million home care company with 400 employees. He has presented over 500 keynote presentations and learning seminars for home care association conferences and corporate meetings. He has written three books and dozens of articles on strategy and leadership, and he is the father of a 33 year old son who lives in a wheelchair and uses the services of home care on a daily basis. Stephen also is serving as the Immediate Past President of the 3500 member National Speakers Association.



Elizabeth Jeffries, RN, CSP, CPAE is a relationship strategist and CEO of *Executive Mastery... a Tweed Jeffries Company*. She consults with and coaches healthcare and business leaders who want to master their influence with their work teams and their customers, and multiply their own performance. Elizabeth is an award winning speaker, columnist, and author of several books, including *The Heart of Leadership: How to Inspire, Encourage and Motivate People to Follow You*. Over one million people in more than 3000 presentations have participated in Elizabeth's "can-do, how-to" programs. From General Electric, to the Crystal Cathedral, and from the American Hospital Association to Churchill Downs, her clients are businesses, healthcare organizations and professional associations

Your Moderator for the Leadership Academy Teleseminar Series:



Dan Cassin brings us more than 20 years of experience in sales and customer service in financial services, residential construction, and home care. Dan works with *Leading Home Care... a Tweed Jeffries company*, and our sister company *Lighthouse Learning Systems... a Tweed Jeffries company*, as a learning program facilitator. Dan presents educational programs on sales and customer service for home care companies, and is the director for a major project to create a customer service culture in the hospitality industry in Greater Louisville. Dan also serves as the moderator for our three different teleseminar series here at Leading Home Care.