Method to the Madness:

Leading Beyond KPIs

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Leadership’s goal is not to be needed for every decision.
It is to build a system where the right choices happen anyway.

Decoding The Forest

- Just Culture “Lights the way” (lantern)
- Servant Leadership “clears the path” (shovel)
- Drucker Management “sets direction” (compass)
- KPIs and Tech “keeps moving us forward” (the path)

Just Culture Or "Light the Path"

- Workplace framework of shared accountability
- **Organizations** held responsible for system design
- **Employees** held accountable for behavioral choices

Just Culture Or "Light the Path"

Be curious and judgement free

- Look for broken processes
- Watch for patterns to guide training (individual and groups)
- Address rule-breaking respectfully (curiosity before correction)

Just Culture Or “Light the Path”

- An example of a really Bad Week at “SouthWest Ambulance”
  - Driver 1
  - Driver 2
  - Driver 3

Just Culture Or “Light the Path”

Fair minded, “Detective Mindset”

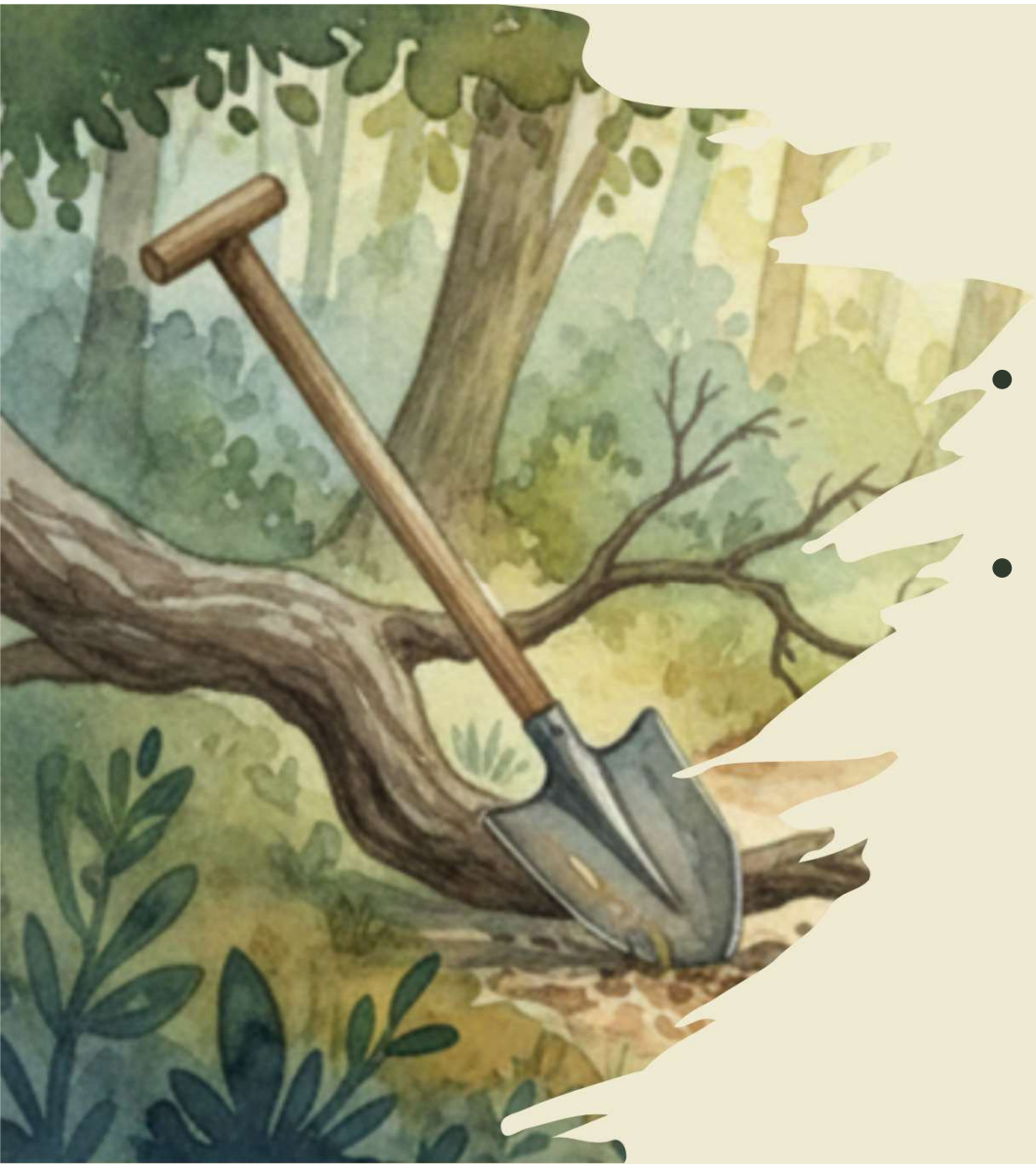
Before judgment ask

- Was this a system issue?
- Were expectations unclear?
- Was training missing?
- Or was this a conscious choice against policy?

Just Culture Or “Light the Path”

Toolkit (ASHP) https://www.ashp.org/-/media/assets/pharmacy-practice/resource-centers/patient-safety/Just-Culture-Toolkit_-Final.pdf

Leadership Training Slides https://www.capstoneleadership.net/wp-content/uploads/2022/01/Just-Culture-LEADERSHIP-TRAINING-PPT.-VMH.pptx.pdf



Servant Leadership or “Clear the Path”

- Leadership removes obstacles
- Authority comes from being
  - Useful
  - Steady
  - Supportive

A Servant Leader in Action

A Servant Leader . . .	Instead of . . .
Shows up daily	Waiting to be asked or needed
Clears the path	Blocking with ego or process
Builds the team up	Carrying the team up the hill

Servant Leadership Toolset

- **HOLDS** framework for managing decisions
- **Eight C’s** for managing interactions
- **FRIED** Agenda for structured meetings

Billing Office Leadership "HOLDS"

- *Holistic Oversight*
- *Owning Accountability Chain*
- *Leading Flexible Resources*
- *Developing Talent*
- *Solutions "In the Moment"*

The Eight C's of Leadership
Values we use to stay oriented
Character
Competence
Confidence
Communication
Consistency
Collaboration
Coaching
Compliance

FRIED meeting Agenda (30 min weekly or monthly)

- ***Friction Removers (5 min)***

Everyone names a success from last meeting. (Not clearing the forest, just clearing the next root)

- ***Interruptions (10 min)***

One or more name an interruption or disrupter since last meeting

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- ***Education (10 min)***

Leader provides education on any topic (software, insurance, policy issue)

- ***Do Next (5 min)***

End the meeting with one item on the “to do” list for each person

Servant Leadership

Remember: Get out of the office and engage!

Servant Leadership Quick Summary
https://www.strategypunk.com/servant-leadership-template/

Servant Leadership Presentation

(Stark State College)
https://www.starkstate.edu/public/system/uploads/files/Student-Life/Servant-LeadershipPowerPoint.pdf

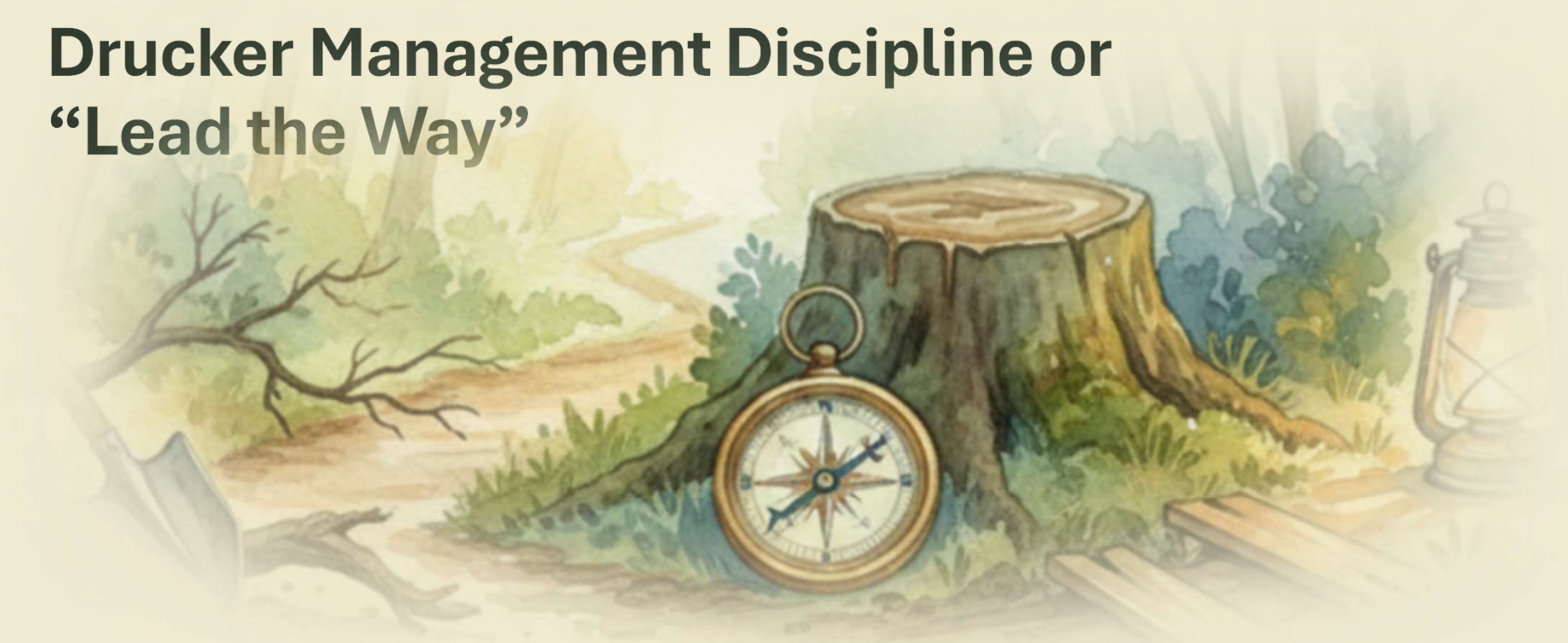
Drucker Management Discipline or “Lead the Way”

Drucker was

- Management professor who studied systems
- Shifted Leadership from “supervision” to “effectiveness”
- Another perspective is Heather McGowan with “Directing to Developing”

https://www.youtube.com/watch?v=SgWpk6ESpOU

Drucker Management Discipline or "Lead the Way"



"Tools without analysis become weapons"

- Drucker believed **Leadership**
  - IS NOT about measuring EVERYTHING
  - IS about deciding WHAT matters

Drucker Management Discipline or “Lead the Way”

Drucker helps us ask

- Is this worth our focus
- Is this making us more effective **(or compliant)**

If not,

should we stop?

Drucker Management "Principles in Action"

Organized Abandonment

(What should we stop doing?)

COVID REPORTS

Effectiveness First

(Results over "fast" or "busy" work)

Hire/Start training while waiting for background check

Strengths Matter

(Build and capture what works)

Senior Staff have institutional knowledge (in their head)

KPI (the path ahead)

Key Performance Indicators

- Measure how well we move “through the forest”
- Helps us use **leadership** tools to correct “lost in the forest”
- Look to Industry Standards

DART: The Technology Advantage

Data (Understanding reality)

Reports, spreadsheets, dashboards

Automation (removing manual friction)

Billing software, ECS billing, Report collation

DART
The Technology Advantage

Data Analysis or
“Understanding Reality”

- Reports
- Dashboards
- Spreadsheets
- Pivot tables

DART
The Technology Advantage

Automation or
“Removing Manual Friction”

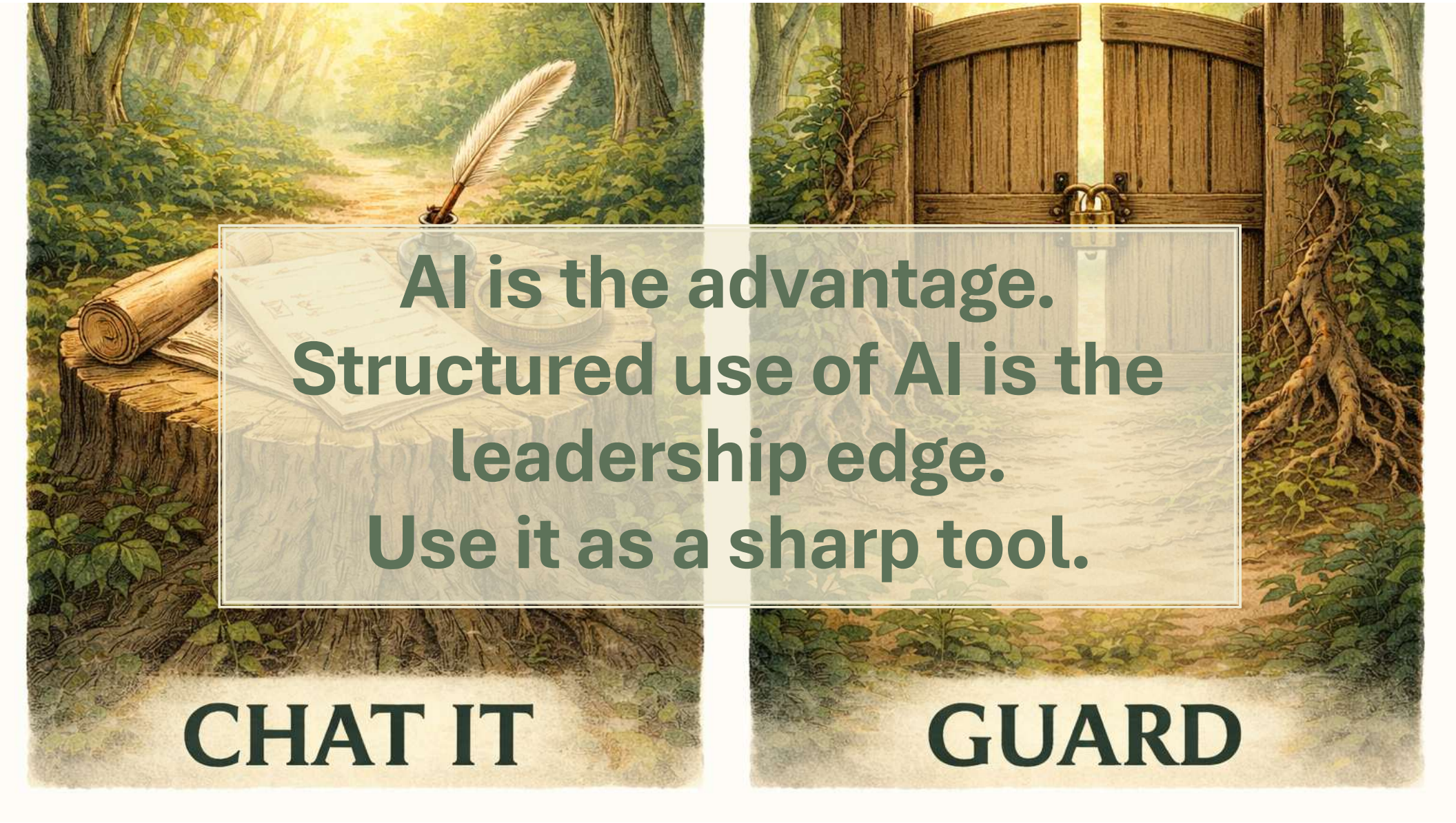
- Billing Software
- ECS Billing
- Report Collation
- Appeal Letters
- Complaints

DART
The Technology Advantage

Resources or

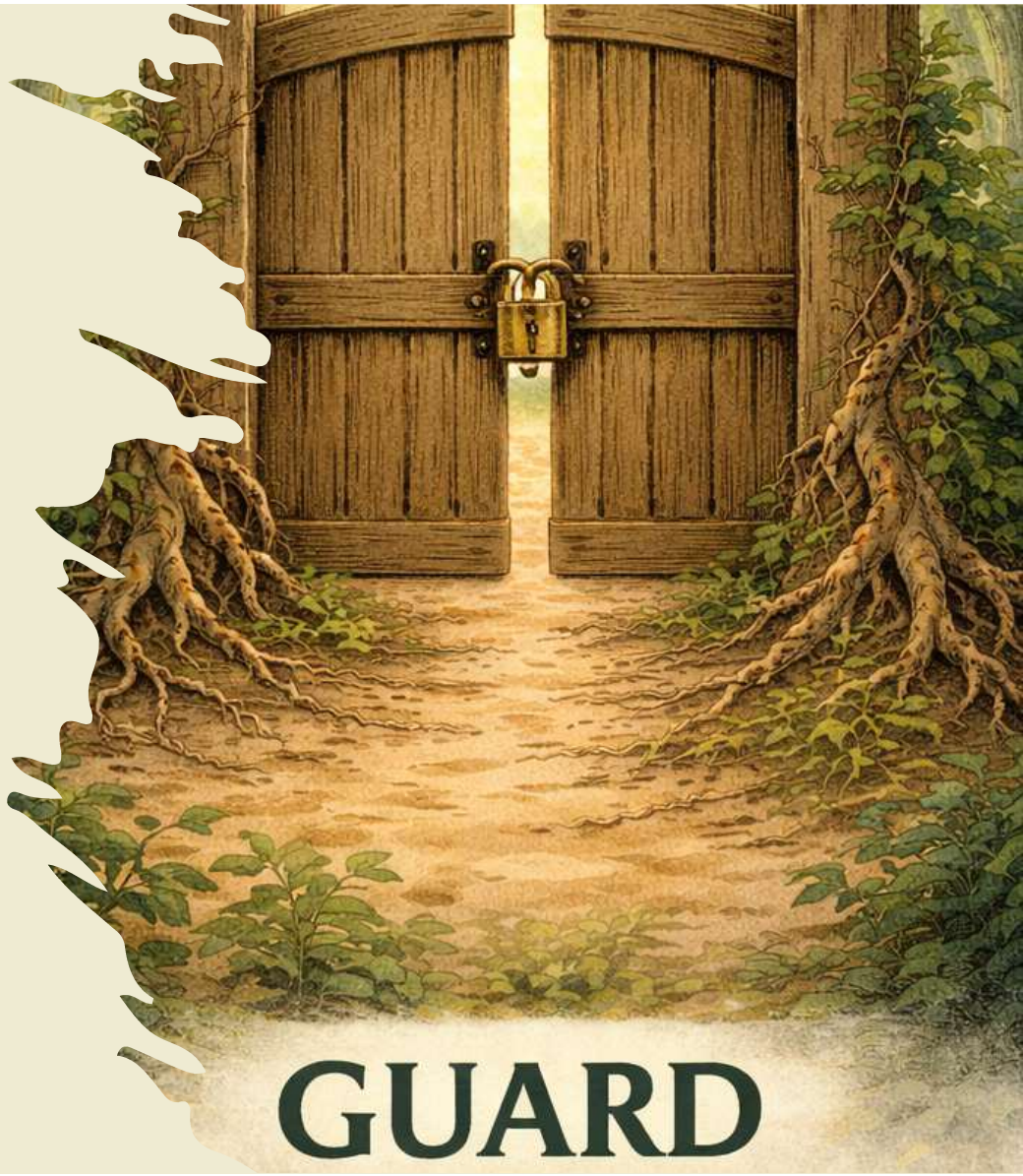
“Extending Human Capability”

- Training /Certifications
- Associations
- Office / Internet
- **Claude /Chat Gpt / AI**


AI is the advantage.
Structured use of AI is the leadership edge.
Use it as a sharp tool.
CHAT IT
GUARD

GUARD:
Protecting AI Use

- **Govern** Establish a policy for AI use
- **Update** Policy as AI evolves
- **Authorize**
- Who uses AI
- Which tools for what purpose
- What cost (budget).
- **Review** output obtained for accuracy and compliance
- **Define** boundaries for data
  - PHI
  - Proprietary
  - Employee information



Another AI Lecture?

- **Its too hard and too time consuming**
  - Use AI to learn about it
  - Set guard rails and practice
- **I don’t like it, not going to use it**
  - You are already using and seeing it
  - It is already in your industry and workplace and daily life
- ***Find someone at company who is excited and give them an opportunity to use it!***
  - ***AI turns problems into prompts***
  - ***Prompts into timesavers***

CHAT IT: Prompting for Better Outcomes

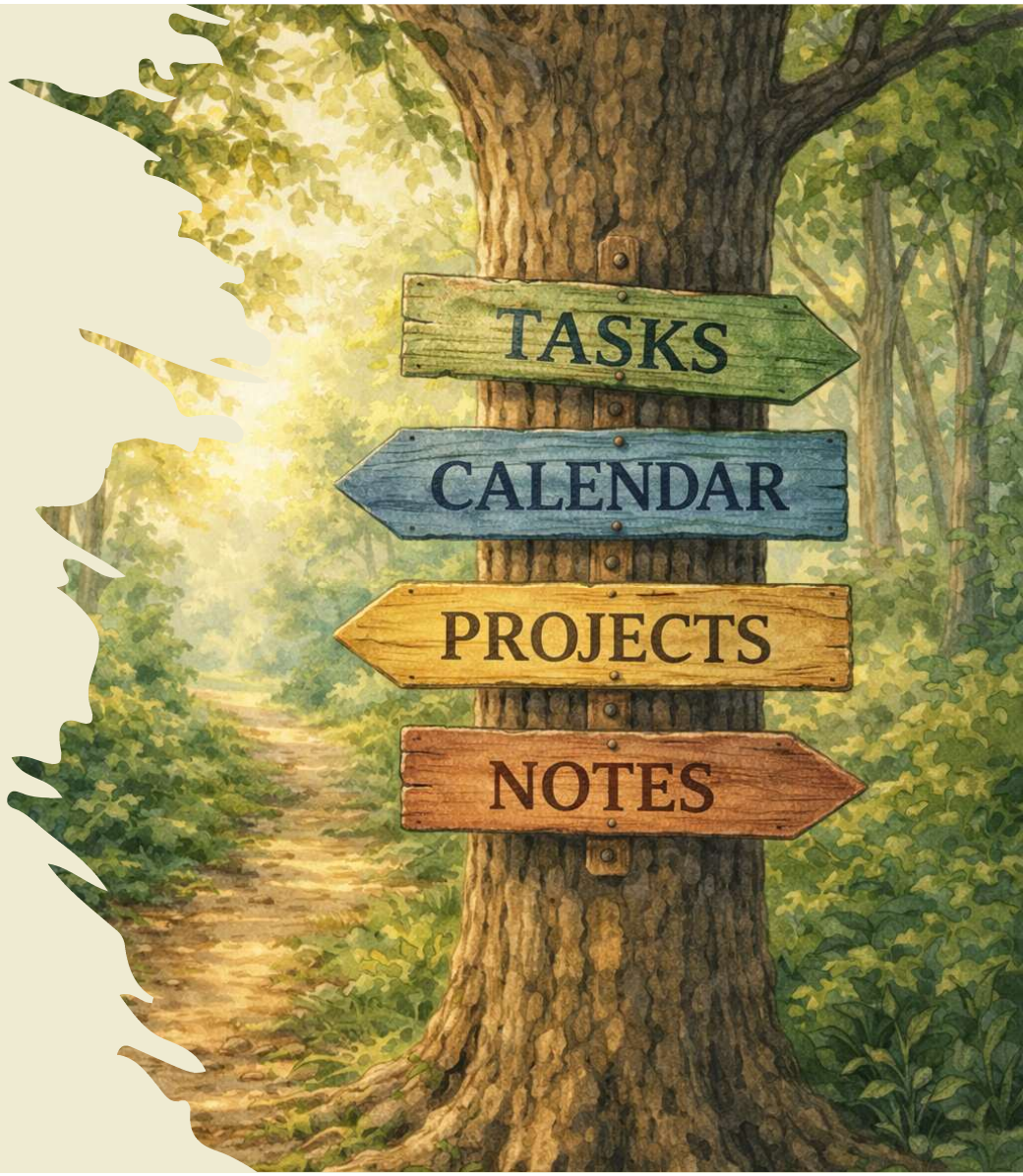
- **Choose** a role
- **Highlight** the task
- **Ask** one thing at a time
- **Tell** the format
  - Excel file
  - Word document
  - PDF
  - Program (python script)
- **Inquire** and revise conversation
- **Take** the wheel (tweak and revise)

“Trackers” or Tools

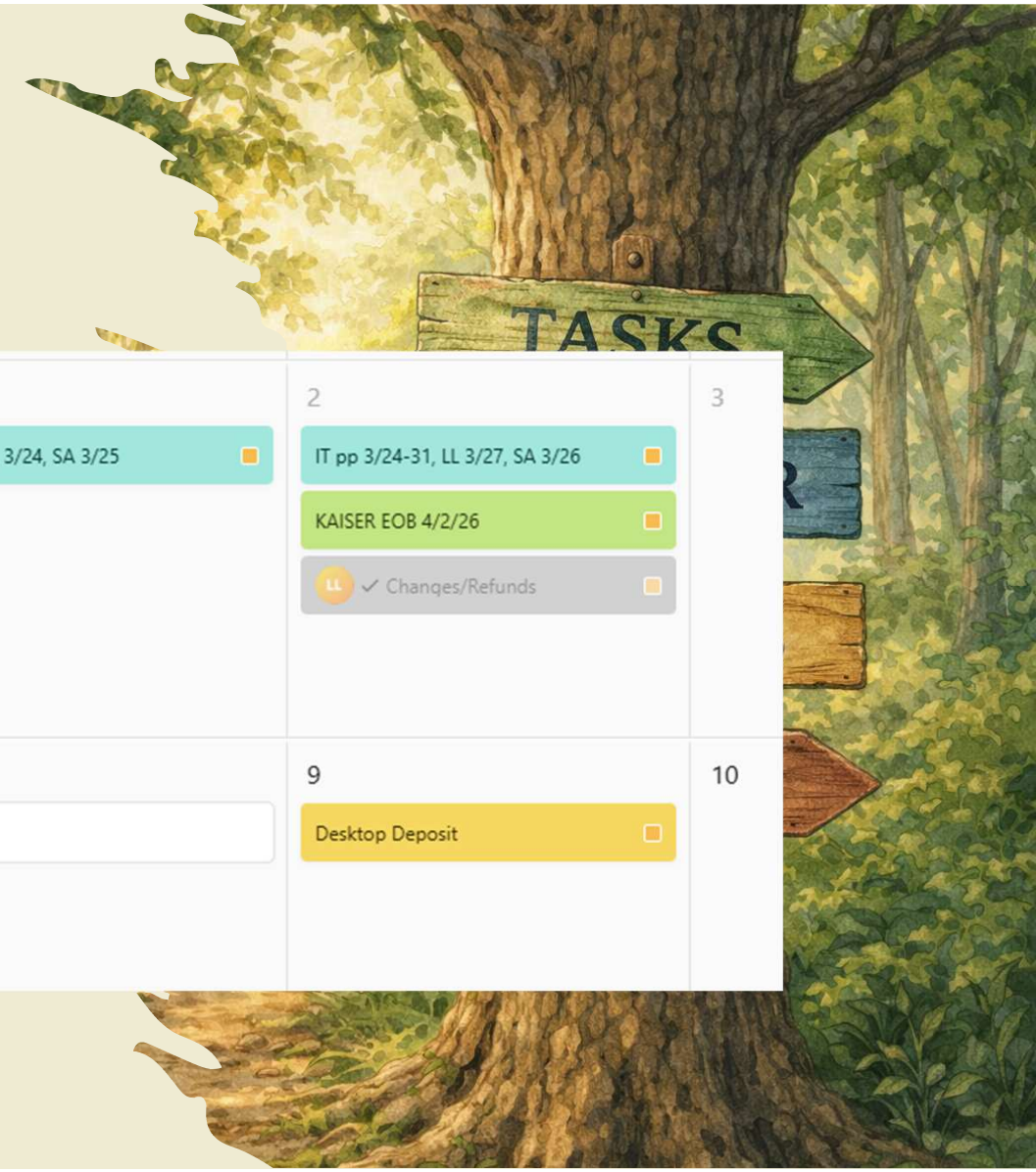
“Seeing the Same Path”

- Asana (Calendar)
- Trello (Task List)
- Notion (Projects)
- One Note (documents)

- *NOT surveillance



DART
The Technology Advantage
Asana (Calendar)



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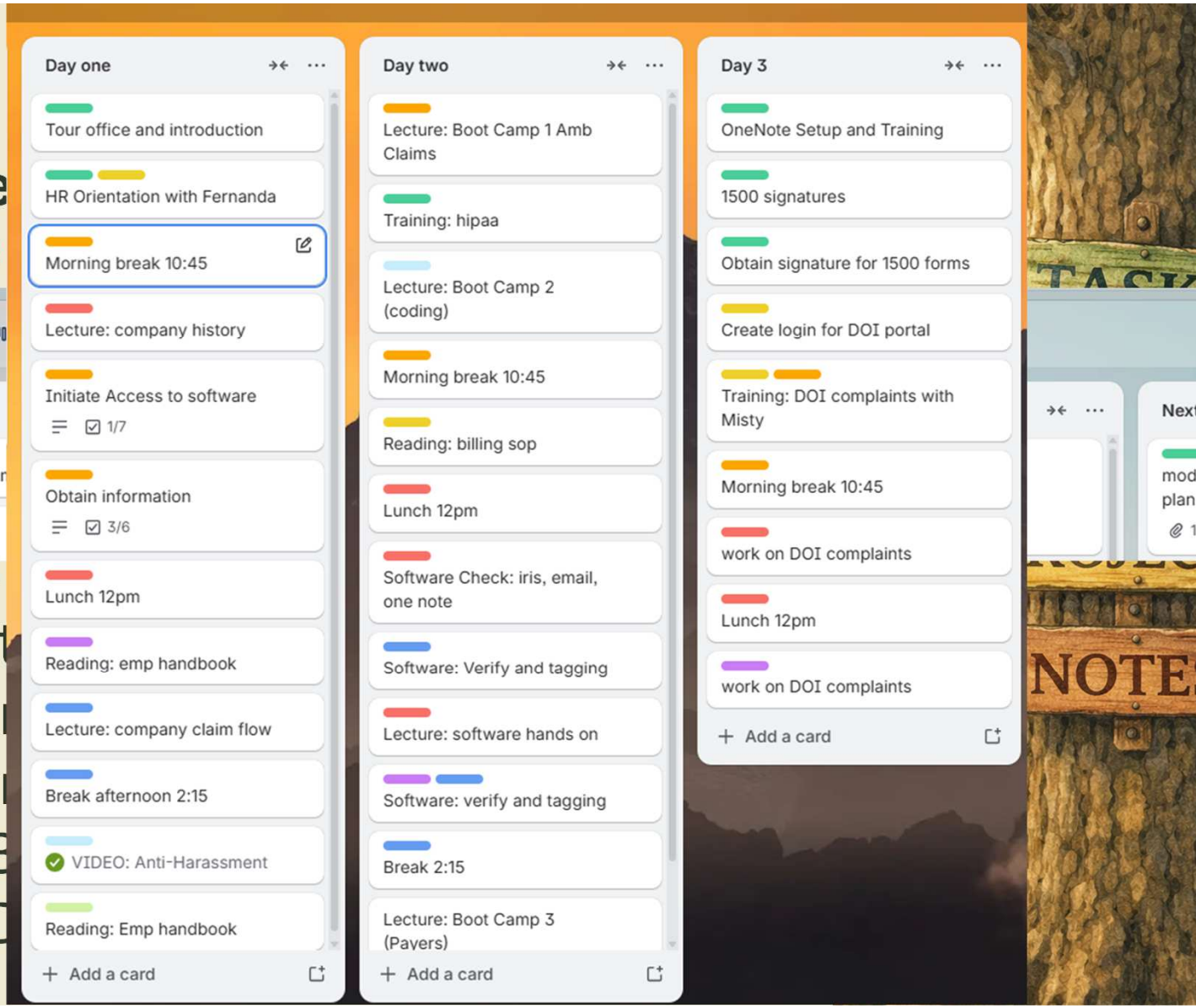
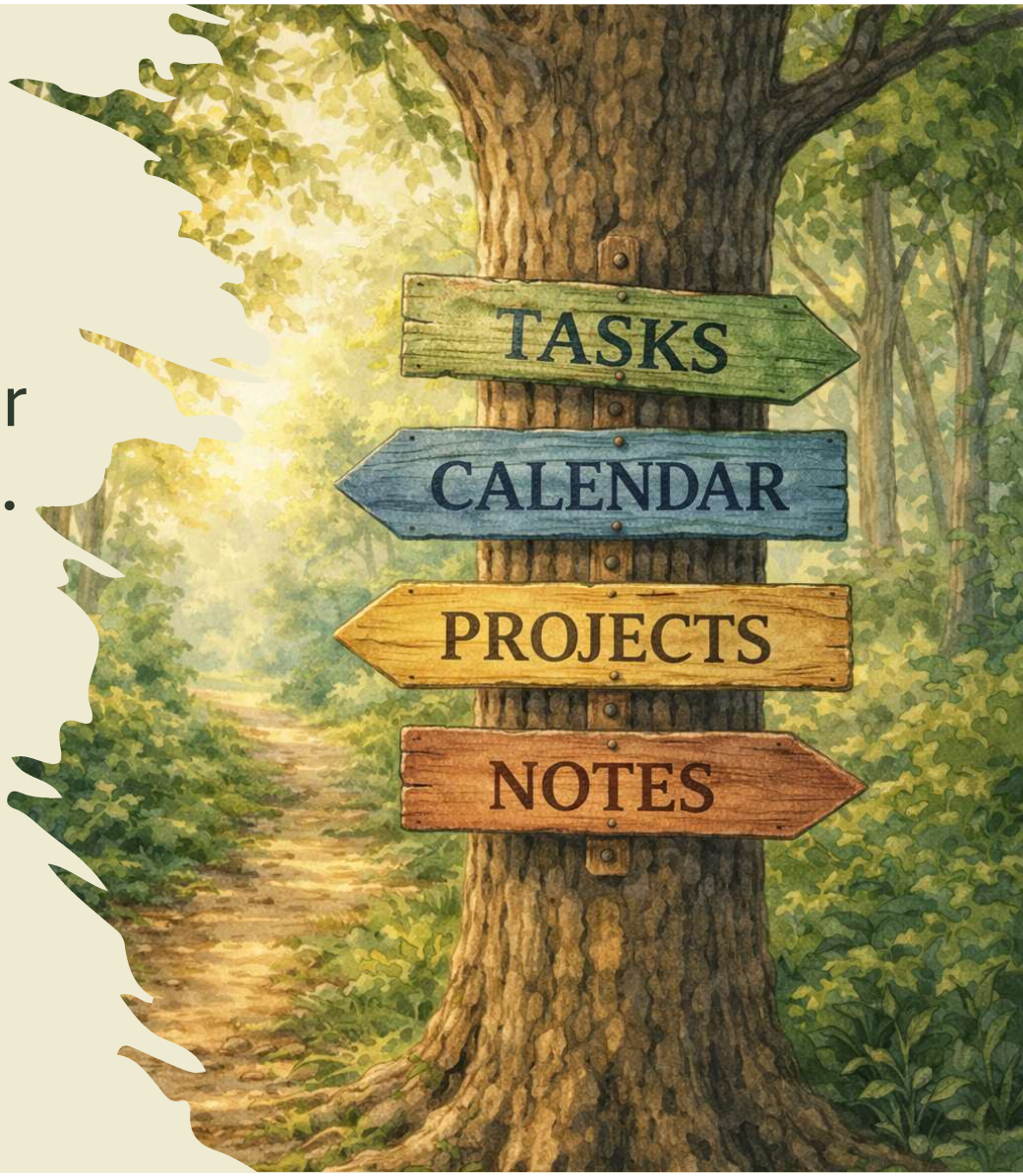


DART
The Technology Advantage
One Note (Documents)

Shared “notebook” (wiki) for sharing process and issues.

Example:

- Medicare Advantage notes on IPA/TPA
- Steps to file state complaint for Balanced Billing issues



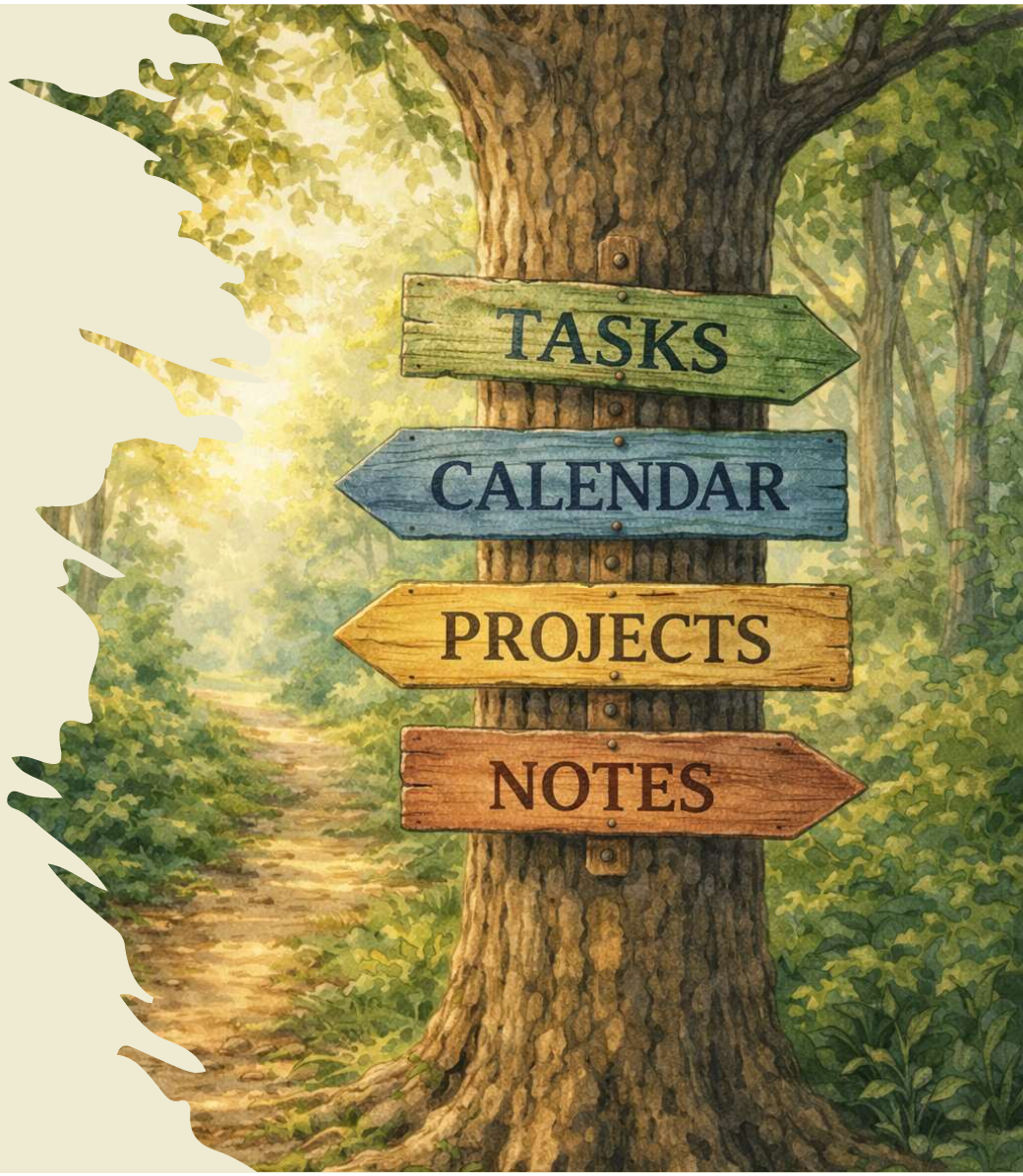
DART

The Technology Advantage

Notion (Projects)

shared projects for multi-layers, multi department.
Examples:

- Tracking project to scan incoming documents
- Tracking Software bugs and solutions



Build a better system

Our goal is not to be needed for every decision.

. . .

Rather to build a system where the right decisions are made anyway.

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