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Project Managers Must Be Good Leaders

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(Author's note: With the increased number and accelerated pace of e-HIM and electronic health record [EHR] projects, Patty and I are rerunning this article from February 2002 as it is more relevant than ever.)

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Leslie: During the past few years, we discussed the importance of leadership in managing the many changes that are confronting health information management (HIM) professionals. Leadership is critical whether changes are incremental or sweeping and requires that HIM professionals think more about their roles as leaders. Leadership is not only the responsibility of the organization's CEO. Leaders can, and do work their magic from anywhere in the organization.

Patty: Magic? Do you really mean magic? You aren't talking about smoke and mirrors are you?

Leslie: No, leadership is certainly not smoke and mirrors. I think effective leadership often appears very natural, even sometimes subtle. However, leaders engage in actions that are definable and recognizable, and they can be learned.

Patty: We don't usually talk about leadership in the workplace as actions that are taken by people throughout an organization. In school, we learned the ABC's of management: planning and budgeting, organizing and staffing, and controlling and problem solving. These activities are the responsibility of HIM managers and very important to successful organizations. Leadership is different, but equally as important.

Leslie: John P. Kotter, retired professor from Harvard Business School, makes a very nice distinction between management and leadership. Professor Kotter posits that leadership is:

1. setting direction (developing vision and strategies to reach the vision)
2. aligning people (building coalitions of people who are committed to achieving the vision)
3. motivating and inspiring people to move in the right direction, despite obstacles. ¹

Patty: HIM professionals, faced with the challenge of accomplishing a variety of projects from improving and streamlining HIM operations, to implementing new systems and technology that will lead to paperless medical records, need strength in both management and leadership. In the role of project manager, it is easy to get so focused on managing the technical steps of an implementation plan that the leadership elements receive less or little attention.

For example, a medical record document imaging system requires a tremendous effort from the project management team to evaluate and revise all medical record forms, to determine workflow changes, develop new policies and procedures, etc. In short, it requires completely re-engineering HIM processes. This work is very demanding and time-consuming. However, such a project represents a change that affects every employee in the HIM department, as well as all medical record users. Most project team managers would recognize the need to communicate that vision, get buy-in from many people and motivate them to

participate fully, but they don't make those things a priority. Mostly, they under-communicate.

Leslie: I think of these leadership actions as creating an environment for successful change. Consciously creating an environment for success means much more than allocating nice space, adequate lighting and ergonomically correct furniture. I am talking about the "emotional environment." Successful leaders are aware of how a change will impact people throughout the department and/or the entire organization. The project manager and team members need a good communication plan to prepare people who will participate in or be affected by the change.

Patty: The project manager and the team members must be able to clearly communicate the vision of the project and/or how the project fits into a larger vision of where the department is going. This means taking time to talk with people inside and out of the department, individually or in small groups, to share the vision and explain how the project will affect them.

Leslie: The project manager and the team members need to think about how the initial message will be heard by people. Will they present it in a way that invites people to contribute their ideas about the vision, the strategy or the way in which the project will be implemented? Recognizing the knowledge and experience of people who are not on the team, and engaging in a respectful dialogue about the coming events will go a long way toward creating an emotional environment in which people buy-in to the vision and help achieve it rather than fearing or resenting the change.

Patty: The leader must also build a coalition of supporters among medical staff, administration and other medical record users. Putting users on the implementation team is one way to reach out for collaboration, but it isn't sufficient. In our example, the vision of the paperless medical record department must be continuously "sold," throughout the institution.

Leslie: Technology projects often take months or even years of development. Keeping the project in front of people during this time, providing frequent progress reports and continuing to emphasize the benefits is useful on several fronts. When the project is ready to "go live," people are so familiar with it that new processes seem less strange and are less anxiety provoking. Also, if the benefits that have been reinforced are truly solving long-standing problems for the users, they will readily see those benefits when the project comes to fruition.

Patty: The frequency and type of communication is important also. Keep in mind it is impossible to over-communicate. Put the topic on monthly HIM department meetings for progress reports, put articles about it in the hospital newsletter, ask the HIM director to give updates at monthly department head meetings, submit progress reports to medical staff and nursing department meetings. Create large colorful posters depicting the vision of the project and hang them in the department, the physicians' lounge and the hospital cafeteria.

Leslie: And don't forget to have some fun! Celebrate milestones as they are accomplished.

Patty: What about the leadership action that professor Kotter described as motivating or inspiring people?

Leslie: When people are motivated, they are energized. I know that sometimes I am really dragging when I come home at night, but if I get engaged in an activity that I am passionate about, a surge of energy overtakes me and I forget all about how tired I am.

Patty: So how do you get people to share your passion for a project?

Leslie: Passion is contagious. It comes across in your body language, your tone of voice, your sincerity and in your own energy.

Patty: The vision also has to be compatible with people's personal values. People find satisfaction in work they believe to be important. If a leader has involved people in defining the vision, has solicited input and has incorporated other people's ideas into the project, there is likely to be alignment with values and a sense of the project being worthwhile.

Leslie: Along with personal values, it helps if the individuals see a direct benefit to themselves. Is a successful project outcome going to open up opportunities for career advancement, personal or professional growth, or financial rewards? Are there other opportunities for recognition of achievement?

Patty: Thinking about leadership is an important step in learning to lead. As project teams put their project implementation plans together they will benefit tremendously from having discussions about how they will lead their colleagues through the change. They need to share their beliefs and ideas for leadership so that the team develops a leadership style. Leadership becomes every team member's responsibility.

Leslie: HIM directors and project managers should consider creating professional development plans on leadership, either individually or for their teams. There is a plethora of literature spanning the centuries on leadership. From Niccolo Machiavelli's The Prince, written in 1513, to The Federalist Papers written during the constitutional convention of 1787, to the biographies of the modern-day CEOs such as Lee Iococca and Jack Welch, leaders and the concept of leadership have fascinated people.

Patty: There are also many instructive works that can guide modern-day professionals in honing their leadership skills. For example, Warren Bennis in On Becoming A Leader writes, "Each of us contains the capacity for leadership."² Furthermore, he observes that learning to lead isn't easy, but it is easier than most of us think.

Leslie: Professor Bennis and Joan Goldsmith have also published a workbook called Learning to Lead. Their "vision of leadership is one in which every person can become a leader in his or her own life."³ Readers can use this book individually or with members of their work teams to do self-assessments, individual exercises or for leadership discussions.

Patty: Another resource for stimulating discussions about leadership is the Harvard Business Review Special Issue, "Breakthrough Leadership It's Personal," published in December 2001. It is fun to have each team member choose an article to read and present a summary to the group for discussion. Open discussions about leadership raise people's consciousness of the attractiveness and value of leadership behaviors throughout the workplace.

Leslie: We could say that leading change is a way of interacting with the rest of the organization that facilitates change in the most healthy and productive ways possible.

References

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3. Bennis, W. and Goldsmith, J, Learning to Lead, Addison-Wesley Publishing Company, Reading, MA. 1997, p 14.

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