Developing a Results-Driven Onboarding and Mentoring Process for Physicians
Speakers

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AMGA 2016 Annual Conference
Medical groups reported an average turnover rate of 6.8 percent in 2012, according to the annual Physician Retention Survey from Cejka Search and the American Medical Group Association (AMGA).

A significant majority (85 percent) have an onboarding process for physicians, yet only one-third (33 percent) of these groups stated that their process is formalized through an onboarding committee or task force.

Groups who assign a mentor during onboarding reported a lower overall turnover rate of 6.0 percent compared with the 6.8 percent average turnover rate for all groups.

Extended onboarding correlates to higher retention of physicians in the early years with a practice. Groups that provide a year-long onboarding process reported a turnover rate of 10.5 percent compared with the average 12.5 percent for physicians between two and three years with the practice, when turnover peaks.
Challenges We Face Together

Top 3 reasons physicians leave:

1. Culture: no awareness of, or alignment with, conscious culture.

2. Dissatisfaction with the way decisions are made, or the perception of how decisions are made.

3. Supervisors lacking leadership skills.
You Can’t Afford Not To Onboard

Strategic physician onboarding programs are linked to:

• Increased physician satisfaction and engagement

• Improved direct reporting job satisfaction

• Improved organizational alignment

• Improved quality and safety metrics
About The Iowa Clinic
About The Iowa Clinic

- The Iowa Clinic, P.C. was formed in 1994. Today we are the largest physician owned multi-specialty group in central Iowa with more than 200 physicians and healthcare providers practicing in 40 specialties. The Iowa Clinic partners with local medical centers and hospitals to provide leading edge healthcare for the patients of central Iowa.

- The Iowa Clinic serves a population area of 1.1 million, averaging over 400,000 patient visits each year.

- Our mission is to provide excellence in healthcare through a patient-focused, physician-governed multispecialty clinic.
Serving Des Moines and Central Iowa
Why formal leadership training?

Driven by TIC Board of Directors

– Strong desire to continue to be an independent physician organization...
– Recognized we needed more physicians with leadership skills

• Partnership The Physician Leadership Institute (PLI)™ based in Tampa, Florida.
The Iowa Clinic
Physician Development Journey

Rapid Growth of Primary Care

How do we maintain the culture of The Iowa Clinic with adding so many new physicians?

Partnership with Physician Leadership Institute

Identification of Potential leaders

Physician Leadership Institute Cohort I 2010-2011

Physician Leadership Institute Cohort II 2012

Physician Leadership Institute Cohort III 2015-2016

New Physician On-Boarding Academy I 2014

New Physician On-Boarding Academy II 2015

New Physician On-Boarding Academy III 2015

TIC New Physician Onboarding Academy

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Physician Onboarding at The Iowa Clinic

Goals for our presentation today...

- Highlight the critical importance and impact of strategic onboarding and mentoring on physician alignment, engagement and retention

- Examples and methods of onboarding, developing and engaging physicians in organizations experiencing exponential growth

- How we designed and executed a formal Onboarding Academy

- How we engaged existing physician leaders in the mentoring, program delivery and in the success of new physicians

- Outcomes of our strategic physician onboarding program
Our Approach

• The Iowa Clinic recognized that cultural successful onboarding was key to alignment, engagement, and retention of its new physicians.

• The physicians and staff of The Iowa Clinic are committed to improving the health of the patients we serve with care and compassion. We believe in this philosophy and the values that are critical to the profession of medicine.

• Our people, education, quality and integrity form the cornerstones of our practice. It is our pledge to uphold the duties of our profession as we dedicate ourselves to healing those we serve.
Step I: Define New Physician Academy Objectives

- Accelerate the transition and integration within TIC
- Ensure success of new physicians and TIC Strategy
- Orient to and engage new physicians in the culture of TIC
- Provide new physicians with the support to be successful
- Establishing a network of support among new and current physician (Including formal mentorship)
- Build a sense of ownership, team, and belonging
New Physician Onboarding Outline

**Functional**
- Quality Agenda
- Data Access and Interpretation
- Tools
- Dashboards
- Resources Available
- Clinical Orientation
- Org Orientation

**Leading For Results**
- Understands the onboarding agenda
- Oriented to the quality tools, dashboards
- Knows the resources available to them
- Oriented to the organization
- Knows the Clinic History, mission, vision and values

**Engaging Others:**
- Meets with the CEO, CFO, CMO, Quality, Board members
- Understands the Clinic’s priorities, challenges and expectations
- Meets the Staff, Leaders, Medical Directors
- Oriented To organization’s culture

**Relationships**
- The Executive Team
- Operational & Division leaders
- Clinic Leaders
- Build Relationships with Peers

**Action Plan**
- 30-60-90 Action Plan
- Early Wins
- Mentorship
- Self Assessment
- Effective Planning
- PSM
- Execute Plan

**Leading For Results:**
- Develops Line of Sight with 30-60-90 day plan
- Identifies priorities and early wins to focus on
- Executes on Plan
- Marketing Plan
- Finance Plans

**Leading Self**
- Meets with mentor from Clinic
- Works with a CTI Leadership Coach when needed

**Outcomes**

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Program Theme

“Welcoming You to the TIC Team and Accelerating your Success”
Step II: Measure

- One on One interviews by PLI executive director
  - Assess the Following:
    - WhyJoined TIC
    - Anticipated Challenges, concerns
    - Areas needing focus and Help

- Online DiSC Assessment
TIC New Provider Challenges

- Patient build up
- Schedule optimization – 3 hospitals, surgery centers etc.
- HC nomenclature – ACO/HMO, Affordable Care ACT, etc.
- Maintaining quality work / life
- Building relationship with our peers - exposure
- Management of people - how to be a good boss, leader
- Understanding the referral process
- How to be successful year after year
- Integration of practice and patients to TIC
- Concerns about building up practice
TIC New Provider Topics of Interest

- How to work with a mentor
- Simplicity and Time Management
- The Healthcare trends and challenges
- TIC History & Vision for the future
- How to drive growth
- The financial Accounting of TIC
- A two year strategy plan for you and your practice
Step III: Design

- Customized Curriculum
  - Individual Development Plans
  - Culture
  - Strategic Priorities
  - Physician’s Role in Achieving Vision
  - Customer Experience
  - Practice Growth

- Faculty – Comprised of veteran TIC physicians, board members, and executive team

- Structured Mentorship

- Group Support and Coaching
Customized Curriculum

To get to know new physicians better and to accelerate their integration into the TIC system and culture:

1. Learn more about the TIC story and, most importantly, its future vision.
2. Meet the members of TIC Board and leadership team.
3. Learn about how to leverage TIC support structure and service to be even more successful in your practice.
4. Meet, get to know, and work with the new providers that have joined TIC recently.
5. Partner with a TIC Mentor that will support you and champion your success
Faculty – Internal & External

TIC Executive Leaders

C. Edward Brown
Chief Executive Officer

Mark Reece, M.D.
Chairman of the Board

Kevin Cunningham, M.D.
Chief Medical Director

Christi Taylor, M.D.
Chief Quality Officer

David Zielke
Chief Financial Officer

Amy Hilmes
Chief Marketing Officer

PLI Team

Mo Kasti
Chief Executive Officer

Mary Ellen Roghan
Executive Director

Margie West
Executive Director

Brad Pollins
Executive Director
Program Components & Timeline

5-21-13  Session 1: Orientation to TIC Culture  5-Hour Session
6-27-13  Session 2: Coaching & Mentoring Orientation  5-Hour Session
7-11-13  Session 3: Culture of Service Excellence  5-Hour Session
7-25-13  1-Hour Coaching Meeting  CTI Coach meets with each Mentor-Mentee Dyad
8-8-13   1-Hour Coaching Meeting  CTI Coach meets with each Mentor-Mentee Dyad
8-22-13  1-Hour Coaching Meeting  CTI Coach meets with each Mentor-Mentee Dyad
9-10-13  Session 4: Innovation & Growth Strategies  5-Hour Session
9-23-13  Session 5: Business & Financial Acumen  5-Hour Session

Mentoring (One-to-One Meetings with TIC Mentor)
Session 1: Orientation to TIC History and Culture

- TIC History and Culture
- Governance Structure
- Strategic Priorities
- Current Healthcare Environment
- Provider’s Role in Achieving Vision
Session 2: Structured Mentorship

Mentoring is a *highly collaborative relationship* between a mentor and a mentee...

that is formed for the purpose of *supporting the growth and success* of the mentee...

and *maximizing the leadership potential* of the mentor.

Mentor Matching (DISC and Specialty)
Session 2: Structured Mentorship

• Structured Matching

• Mentors are Graduates of the Leadership Institutes

• Mentoring Playbook
  – Mentoring Agreement
  – Mentoring Clear Objectives and Goals
  – DiSC Profile Assessment
  – Coach Supported by PLI
Mentoring Roles

**Mentee**
- Drive the relationship
- Plan your development
- Ask for help
- Prepare questions
- Share insights and lessons learned with your mentor
- Be open to learning and feedback

**Mentor**
- Advise and coach
- Support and encourage
- Share resources
- Make connections
- Be a champion
- Be a thought partner – think through challenges together
- Provide feedback
Mentoring Focus Area

✓ Practice Growth and Success
✓ Leadership Effectiveness
✓ Career at The Iowa Clinic
✓ Personal Growth and Development
Session 3: Culture of Service Excellence

F·R·O·S·T

Physician’s Role in Patient Experience
- role model for staff

Patient Satisfaction Measurement
- tools and resources
Session 4: Innovation & Practice Growth Strategies

• Assess Current State of Your Practice
  – SWOT Analysis

• Strategies and tactics for growing your practice

• What can marketing do for me?
Session 5: TIC Business & Financial Acumen

• Healthcare Finance Overview
  • Where does our revenue come from?

• TIC and Department Financial Performance

• Understanding Physician Compensation
Upon Completion . . .

Participants were able to:

• Explain The Iowa Clinic’s Culture, its vision and values
• Define their practice and personal goals, identify gaps and connect with a TIC mentors to help them succeed.
• Think like an owner, with strong financial and business acumen. Describe the Iowa Clinic financial process and the physician’s role in financial management and stewardship.
• Use collaboration best practices in their work with team members, colleagues and other stakeholders.
• Apply strategies for innovating new markets and growing their practice
Results – After the Academy Participants Reported Improvement in...

- Engagement
- Integration
- Patient Experience
- Confidence
- Quality
- Willingness to serve
- Feeling Supported

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Top Outcomes

- Very supported by TIC
- Know executive team better
- Established support network
- Made right decision to join TIC
- Better understanding of TIC
Lessons Learned

Onboarding is not an event
Cultural onboarding begins during the recruitment process
Part of a cultural transformation
Part of talent development
Need leaders to develop leaders
Connect the physicians early to a bigger purpose
Listen to their concerns
Mentoring relationship is key
Here to help them
Ongoing Improvements

• Part of Employment Agreement
• Reduced Time Commitment
• Added Session on Population Health Management
• Mentoring has Evolved
• Spouses Invited to Participate in Kick-off and Graduation
• Small Group Sessions
Impact

• “The entire Physician Leadership process, including the Physician Onboarding Academy, has dramatically strengthened The Iowa Clinic’s culture and improved its ability to adapt to change because we have physicians leading physicians.”

• “We have dramatically improved our internal capabilities. When physicians develop answers together, they build solutions even as they strengthen their own relationships amongst each other. They believe in the mission because they own it.”

• “The ability to execute becomes exponentially greater when you have this strong bond of trust in a common culture, a common way to doing things together.”
We Believe...

...that Physician Engagement and Leadership are ACCELERATORS of All Initiatives!

...that Transformation Starts with Physician Engagement and Leadership
Quick Review

You now have the information to explain:

• The critical importance and impact of strategic on-boarding and mentoring on physician alignment, engagement and retention

• Examples and methods of onboarding, developing and engaging physicians in organizations experiencing exponential growth

• How to design and execute a formal Onboarding Academy

• How to engage existing physician leaders in the mentoring, program delivery and in the success of new physicians

• Outcomes of a strategic Physician Onboarding program
Questions?
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