The 5 Step Management System

Derek A. Preece, M.B.A
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Disclosure Slide

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Derek Preece

Derek is a Principal and Executive Consultant at BSM Consulting. Allergan, Inc. is a client of BSM Consulting.

Background
Derek A. Preece, MBA
Principal and Executive Consultant at BSM Consulting; BA in Communications and MBA from BYU
27 years consulting with medical practices
Former practice administrator
Former managing partner at KNFL radio in Montana

Our Purpose Today
Teach you the 5 Step System of Management
Review the 5 Steps of Employee Responsibility
Show how this system helps poor performing employees fire themselves
Explore What to Do when Employees Don’t Achieve their Goals
What are your most difficult employee management situations?

Do you have a “system” for:

- Checking patients in?
- Working patients up?
- Billing and collecting?
- Managing your staff?

Why do we use systems?

- To make sure we do everything we need to do
- So that if there is a problem, we can review the system and figure out where the breakdown is
- To be consistent

Why don’t we use a “System” of Management?

- Provides better transparency in the management/employee relationship
- Helps define and limit management’s responsibilities
- Helps define and expand employees’ responsibilities
- Helps you be consistent and fair to all employees
- Helps you know what to do when there is a breakdown

“A System”

“A way of accomplishing something using step-by-step procedures”
The 5 Step System of Management

1. Provide the **Tools**
   - Computer & equipment
   - Phones
   - Forms

2. Provide the **Training**
   - Reveal your expectations
   - Use spaced repetition
   - Model appropriate interactions
   - Teach people skills
   - Teach customer service skills and responsibility
   - Teach time management and prioritization
   - Coach for improvement

3. Set **Goals**
   - Goals give direction
   - Goals help us measure progress
   - Goals are a prerequisite to accountability
   - Employees sets his/her own goals
   - You review and approve goals

4. Become a **Resource**

5. Hold **Accountable**
### Why set Goals?

“The trouble with not having a goal is that you can spend your life running up and down the field and never scoring.”

*Bill Copeland*

### The 5 Step System of Management

#### 4. Resource
- Be available
- Be ready to listen
- Have an open mind
- Be trustworthy
- Don’t overreact

#### 5. Accountable
- Measure and emphasize progress rather than just completion of goals
- Have frequent contact
- Request documentation of progress in writing
- Provide Feedback:
  - Correction when necessary
  - Commendation whenever possible

### Become a Resource

- Help with ideas, guidance, training, resources
- Don’t take the monkey on your back
The 5 Step System of Management

1. Provide the **Tools**
2. Provide the **Training**
3. **Set Goals**
4. Become a **Resource**
5. **Hold Accountable**

The 5 Steps of Employee Responsibility

- Use the **tools** that are provided
- Apply the **training** they receive
- Set and accomplish **goals**
- Ask for **help** when needed
- Be **accountable** for progress towards their goals

An excellent resource on accountability is *QBQ! The Question Behind the Question* by John G. Miller

What do employees really want?

The Five Step System of Management and Employee Responsibility

1. Management provides the tools
   - Employee uses the tools
2. Management provides the training
   - Employee applies the training
3. Management helps in goal setting
   - Employee sets and accomplishes goals
4. Management becomes a resource
   - Employee asks for help when needed
5. Management provides for accountability
   - Employee reports on progress towards goals

Achievement ➔ Recognition
Outcome…

For the Employee
- Increased self-esteem
- Greater accomplishments
- Developed talents

For the Manager
- Motivated employees
- Elimination of poor performers
- Practice success
- Personal fulfillment

Why Isn’t the Employee Achieving Their Goals?

The Diagnosis
They are 1) Untrained 2) Unable or 3) Unwilling

Your Most Difficult Situations:
1. 
2. 
3. 

Implementation

Make sure you understand the concepts

Teach your staff the 5 Step Employee Management System and the 5 Steps of Employee Responsibility

Use the Employee Survey to measure team member perceptions

Use the Review and Goal Packet to set goals

Use the Goal Progress Report to receive reports

Email me and I’ll send you these materials
Thanks for listening!
dpreece@bsmconsulting.com