Case Managers’ Continuum;
Case Managers’ Conundrum

When Weebles Don’t Wobble

Presented by:
Irving Stackpole, RRT, MEd

Environmental Challenges
- Scope & time conflicts
  - Too much Scope and…
  - “Not enough Time”
- Evaluation by “exceptions”
  - Case managers’ “errors”
  - Who defines service errors for case managers?
- Boundary permeation
  - Where does “the job” end and “me” begin?

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Environmental Challenges

- Scope & time conflicts
  - scope and ≤ time
  - At what point does “more” = “too much”?
  - Who decides?

- Evaluation by “exceptions”
  - Case managers’ “errors”
  - A definition of “quality”
  - A definition of service errors
  - Managing expectations
    - Clarifying “exceptions” define quality

System Problems vs. Behavior

<table>
<thead>
<tr>
<th>Ability</th>
<th>Weak</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undesirable Performance</td>
<td>Related behavior</td>
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Case Managers’ Continuum

Environmental Challenges

- Systems Perspective v. Personal
- Boundary permeation
  - Where does “the job” end and “me” begin?
  - Are the systems designed to support the people or vice-versa?

Continuum or Conundrum?

Failing to “contain the continuum”

- Task Fatigue
- Professional defensiveness
- Functional (task) inefficiency
- Functional dis-integration

An Application of Hooke’s Law

Change & Equilibrium
When Weebles Don’t Wobble

Case Managers ≠ “management”
- Weebles ≠ Wobbling
- When managers ≠ manage
- And Weebles ≠ Wobble
- Recognizing the “≠”

Live and let Wobble

Want to send a greeting?

Why this job?

Job Title: Case Manager

<table>
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<tr>
<th>Salary</th>
<th>Benefits</th>
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<tbody>
<tr>
<td>Case Manager</td>
<td>$60,000</td>
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One Harvard Street, Brookline, MA 02445 USA  Phone: 001 617-739-5900  Fax 001 617-739-5929  www.StackpoleAssociates.com

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Why this job?

Management Style?

In Summary

- Highly pressurized roles
- Vague “systems”
  - Vague / variable output measures
- Internal vs. external rewards
Borrowed Wisdom

We don’t know what we don’t know
We can’t do what we don’t know
We won’t know until we measure
We don’t measure what we don’t value
We don’t value what we don’t measure

Source: Harry, M & Schroeder, R, Six Sigma

The Challenge

➔ Issue - Leadership
We must define the criteria of success

- Personal
- Professional

Leadership & Management

Leadership:
Articulate a vision that’s compelling
Change Agency

Management:
Accomplish goals & objectives
Complexity
Leadership & Motivation

Leadership:
Articulate a vision that’s compelling
Change Agency
➢ Motivation
- 'Prompting others so as to evoke specified behaviors'
- Can anyone ‘cause’, or ‘make’ anyone do anything?

Leadership
• The pace of change has quickened
  • Regulatory changes
    - Inspections
  • Demographic changes –
    - Workforce & Consumers
    - Ethnicity & ageing
  • Macroeconomic changes
  • Outsourcing
  • Technology
Leadership

• Change has drawn us into new partnerships, testing old models
• Are we searching for ways to respond?

How will you?

Do we have a choice?
Leadership & Motivation

Leadership – Some Principals*

- Model the way
- Inspire a shared vision
- Challenge the process
- Enable others to act
- Encourage the heart


Leadership

- Model the way
  - Are you asking others to do what you wouldn’t?
  - Are you talking about your values?
  - Do you have a compelling story?
- People first follow the person, then the plan

*Leadership - Some Principals is a concept from the book "The Leadership Challenge" by James M. Kouzes and Barry Z. Posner.

“A pessimist would say the glass is half empty.
An optimist would say something naïve and annoying.”

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Leadership Modeling - The Story

Share your story…
  What you value;
  What has been accomplished;
  The difference this has made.

Leadership & Motivation

Leadership
  • Model the way
  • Inspire a shared vision
    • Do you have a clear & exciting picture / image?
    • How could it be?
    • How big is your dream?

Leadership Modeling - The Vision

What is your Vision?
  Describe the future you would like to invent!
  How does this relate to the Vision / Dreams of your colleagues?
Leadership & Motivation

Leadership

- Model the way
- Inspire a shared vision

- Challenge the process
  - Do we really have to do it this way?
  - FACT: ~15% of errors are due to undesirable behavior
  - 85% of errors are the result of “SYSTEMS”

Differentiate Between System Problems and Behavior

Leadership – The System

- What part of the “system” are you going to challenge?
- How and when?
- Who will you recruit?
- How will you hold yourself to it?
Leadership

Model the way
Inspire a shared vision
Challenge the process

Enable others to act
- How often do you say, “We…”
- Are you trusted? Do you trust?
- Do you have the information you need?
- Do others have the information they need and the authority to act?

Encourage the heart
- Faint heart never won the long sought prize
- How do you uplift yourself?
- How do you emotionally support your colleagues?
- Most of us live up to the standards created by those with whom we have the most contact / deepest emotional ties, so…
  - Who’s in your network?
  - Who would you like to have in your network?

"You spent four days rubbing elbows with the top people in our field and all you brought back are bruised elbows?"
Leadership – The Support System

- List one person who is not in your network, and whom you will recruit
  - What will you say / do?
  - What’s in it for you?
  - What’s in it for them?

Leadership

- Model the way
- Inspire a shared vision
- Challenge the process
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Leadership & Motivation

Motivation – A Definition:

“...to furnish with a motive or motives”*

“Motivation” resides within each person;

Our job is to connect with our motives, and “discover” motivations…

Leadership & Motivation

We DO need…

➢ Focus on clear standards
  ➢ Tell wonderful stories
  ➢ Expect the Best
  ➢ Pygmalion is validated by of data
  ➢ What’s expected predicts outcomes.

Pay Attention

➢ Be present with each person, at each encounter.

Personalize Recognition

➢ Theirs and your own!

Goal Setting

➢ The value and importance of Goals
  ➢ Whatever they’re doing, communicate and remind why it’s important, and the end it’s serving
Leadership & Motivation

Then, people need to know how they and the organization are doing against the GOALS

Feedback
- Measures
- What gets measured gets done

Borrowed Wisdom

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Goals + Feedback = Bonanza!

Percentage Increase in Performance Effort

- Goals & Feedback
- Goals Only
- Feedback Only
- Control
Leadership & Motivation

- What the behavioral research says about motivation
  - Productivity (i.e., motivation) linked to key variables
  - Retention / Productivity closely linked

Psychological & Organizational Construct

Maslow’s Hierarchy of Needs
- Physiological
- Safety
- Social
- Esteem
- Self Actualization

Motivation & Productivity

Employment Motivation & Productivity Hierarchy*
- Basic Needs
- Management Support
- Team / Peers
- Growth

* From First Break All The Rules, Marcus Buckingham & Curt Coffman
**Motivation & Productivity**

**Basic Needs**

- Do I have the materials needed?
- Do I know where / how to find / access them?
- Do I know what is expected of me?
- Are there clear standards for my job?

**Management Support**

- Someone encourages my development
- Someone at work cares about me
- Receive recognition or praise
- Opportunity to do what I do best

**Teamwork / Peers**

- Have a best friend at work
- Fellow employees are committed to quality
- Mission / purpose of the organization
- My opinions seem to count
Motivation & Productivity

Growth
- Opportunity to learn & grow
- Review progress at work with my supervisor

Leadership & Motivation

Our Objectives
- Specific
- Measurable
- Actionable
- Relevant
- Time-based