



Tell Your Boss Takeaways from **“Congrats on the Promotion -- Now what happens?”**

Speakers: Diana "Di" K. Hall, CPCS CPMSM FMSP

Thesis: Medical Services Professionals (MSPs) do not always take a direct path into the field and usually don't have a formal background in professional development and growth. Often promoted within organizations after showing above average technical skills, including competency and quality, there is little formal training on what happens at each step of the career leadership ladder. Moving from technical expert to team leader/junior manager and upwards to directors and vice-presidents within the field, much of the administrative leadership is learned through trial and error versus an actual plan or formal guidance. This session strives to provide tools and techniques throughout the MSPs career journey.

Learning Objective#1: Upon completion, attendees will identify the current shape of their path of MSP career leadership and how to best make impactful actions towards desired outcomes

Key points:

| | |
|---|--|
| <ol style="list-style-type: none"> 1. Analytical Thinking 2. Budget/Finance 3. Change Management | <ol style="list-style-type: none"> 4. Communications 5. Evaluation |
|---|--|

Learning Objective#2: Upon completion, attendees as a group will identify and work through their own challenges and share successes via group polling/discussion

Key points:

| | |
|--|--|
| <ol style="list-style-type: none"> 1. Human Resources 2. Legal 3. Performance Improvement | <ol style="list-style-type: none"> 4. Political Savvy 5. Professional Presence |
|--|--|

Learning Objective#3: Upon completion, attendees will take home tools/worksheets to continue to tweak areas of improvement in mentorship, skill enhancement, change leadership and succession planning

Key points:

| | |
|--|---|
| <ol style="list-style-type: none"> 1. Relationship Building 2. Performance Improvement 3. Risk Management | <ol style="list-style-type: none"> 4. Communications 5. Medical Staff Professionalism |
|--|---|



The banner features a dark blue background with stylized mountain ranges. In the center, two triangles are positioned side-by-side. The left triangle is orange and contains a white sun with rays and a mountain range. The right triangle is teal and contains a white crescent moon, stars, and a mountain range. Overlaid on these triangles is the text 'NAMSS' in red and '48th' in white script. Below the triangles, the text 'Educational Conference & Exhibition' is written in red, followed by 'Denver, Colorado' and a mountain icon, and 'September 29 – October 2, 2024'. At the bottom, the text 'TOMORROW'S MSP®: IMPACT. INFLUENCE. INSPIRE.' is displayed in white, with 'IMPACT.' in orange, 'INFLUENCE.' in red, and 'INSPIRE.' in teal. The NAMSS logo is in the top right corner.

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NAMSS
48th

Educational Conference & Exhibition
Denver, Colorado 🏔️ September 29 – October 2, 2024

TOMORROW'S MSP®: **IMPACT.** **INFLUENCE.** **INSPIRE.**

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The slide features a dark blue background with stylized mountain ranges. On the right side, there are two triangles: a teal one with a white crescent moon and stars, and an orange one with a white sun and rays. The text 'Congrats on the Promotion – now what happens?' is written in orange. Below it, the text 'Diana K. “Di” Hall CPCS CPMSM FMSP Independent Consultant' is written in white. The NAMSS logo is in the bottom left corner.

**Congrats on the Promotion –
now what happens?**

Diana K. “Di” Hall CPCS CPMSM FMSP
Independent Consultant

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Disclosures

- I **do not** have relevant financial relationship(s) to disclose.

How are we rolling today?

- Overview of career progression of the Medical Services Professional (MSP) & Di's personal journey
- Discussion of where YOU are on the MSP Career Pathway
- Identify additional resources to continue and help YOU advance in your career path

Is there a difference?

- Leadership vs. Management



Management and Leadership are not the same

- Leadership – inspiring others with their vision of the big picture. Developing long-term, industry important ideas for an entity.
- Management – setting goals and projects for others to complete specific tasks. Operational and detailed oriented; focused on the day-to-day tasks of keeping the lights on for an entity.

What does career progression mean?



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There are usually four progression steps:

- From NAMSS Tomorrow MSP Job Description Builder and Career Pathway
 - Entry Level (Foundation)
 - Mid-Level (Specialist/Coordinator)
 - Management Level (Manager)
 - Executive Level (Executive)
- <https://www.namss.org/Tomorrows-MSP/MSP-Job-Description-Builder>
- <https://www.namss.org/Tomorrows-MSP/Career-Pathway>

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Entry Level – Associate/Assistant/Coordinator

- Entry-Level Position **Supports** departmental activities while still developing skills and knowledge as a MSP; needs close supervision and training. (Foundation)

Mid-Level – Team Leads/Senior Coordinators

- Mid-Level Position **Manages** departmental activities (*or team/sub-group*) and needs little supervision; they understand their tasks and how it contributes to the greater whole. (Specialist/Coordinator)

- *Italics – added by di*

Management Level – Managers/Directors

- Management Level Position **Oversees** departmental activities as a program and project manager; will likely supervise a large team and be involved in larger corporate conversations. **Serves as the leading resource of the department.** (Manager)

Executive Level – Directors/VPs/C-Suite

- Provides **executive oversight to departmental activities** and is a leader with their organization including taking part in strategic conversations and championing MSPs and patient care and safety. (Executive)

Di's Journey – Professional Career

- 1993 to 1996 – Amarillo, TX:
 - Working on Master's Degree to Temporary Staff at Hospital Medical Staff Office (MSO)
 - Moved over MSO to Temporary Staff at Preferred Provider Organization (PPO) and hired full time as Credentialing Coordinator
- 1997 to present - Atlanta, GA:
 - Hired as Credentialing Specialist for Emory Healthcare PPO (Georgia 1st)

Di's Journey – Professional Career

- 2001 – Other Titles at Georgia 1st/1st MN:
 - Director – Credentialing
 - Director – Provider Management
 - Credentialing Liaison (Operations)
- 2006 – Medical Doctor Associates/Cross Country
 - Manager, Compliance & Quality Improvement
 - Sr. Director, Compliance & Quality Improvement

Di's Journey – Professional Career

- 2023 – Children's Healthcare of Atlanta
 - Manager, Provider Data Management
- 2024 – Independent Consultant – Atlanta, GA

That's a lot of different titles!!!



POLLING QUESTION

- QUESTION: Where are YOU on the MPS Career Pathway?
- ANSWERS:
 - Entry Level - Foundation
 - Mid-Level - Coordinator/Specialist
 - Manager - Manager
 - Executive - Executive

Polling Question Results

- Entry Level - Foundation
- Mid-Level - Coordinator/Specialist
- Manager - Manager
- Executive - Executive

Career Progression Worksheet

| | |
|---------------------|---|
| Employee Name: | Ima Sample |
| Date: | 1/1/2024 |
| Current Title: | Credentialing Assistant |
| Current Strengths: | 1 - curiosity |
| | 2 - ability to use software system |
| Development Needs: | 1 - less than one year on job |
| | 2 - needs to better understand the "why" for activity |
| | 3 - needs to be more vocal in staff meetings |
| Professional Goals: | 1 - better understand "why" for activity of teams |
| | 2 - become more confident in speaking up with ideas |

Career Progression Worksheet

| | |
|----------------|--|
| Employee Name: | Ima Sample |
| Step 1: | Action: Take NAMSS Cred 101 Class |
| | Objective: Better understand "why" of MSP work |
| | Measurement: Successful completion of class |
| | Timeframe: Complete before January 1, 2025 |
| Step 2: | Action: Enroll in local Toastmaster club |
| | Objective: Become a more confident speaker in group settings |
| | Measurement: Invite manager to 1st Toastmaster speech |
| | Timeframe: Complete before January 1, 2025 |

How was I promoted???

- Promotions occur to -
 - The technically proficient
 - The problem solvers
 - The go getters
 - The late workers
 - Nepo Babies/"Good Ol' Boy" Network


When was I promoted?

- How do MSPs arrive at their Job Levels/Job Titles in their career?
 - Internal promotion
 - Added responsibilities due to organizational need
 - Job Change
 - Other

Competency within your current role

- Technology
- Governance
- Patient Safety
- Policies & Procedures
- Seeing the Future
- Finding and Fixing Problems

The Peter Principle



The Peter Principle

[thə 'pē-tər 'prin(t)-s(ə-)pəl]

The idea that people will be promoted up to a point where they are no longer qualified, leaving a company full of incompetent employees.

Investopedia

Investopedia / NoNo Flores

<https://www.investopedia.com/terms/p/peter-principle.asp>

Solid on the “Basic Skills” of the Workplace

- Communication
 - Speaking, Writing, and Listening
- Computing
 - Microsoft Office Suite
 - Credentialing Software
- Common Sense
 - If you see something, say something

How far can “current competency” go?

- A long way (see The Peter Principle above)
- Other skills are needed – both learned and natural
 - Good Listener
 - Empathetic
 - Financial Literacy
 - Entity Hierarchy Savvy
 - Human Resource Comprehension
 - Peer/Mentor Connection
 - Structured/Organized



How do/did you acquire these skills?

- High School/College Coursework
- Organizational Training
- Specialty Training
- Professional (Industry) Training
- Peer Group/Mentoring
- Other



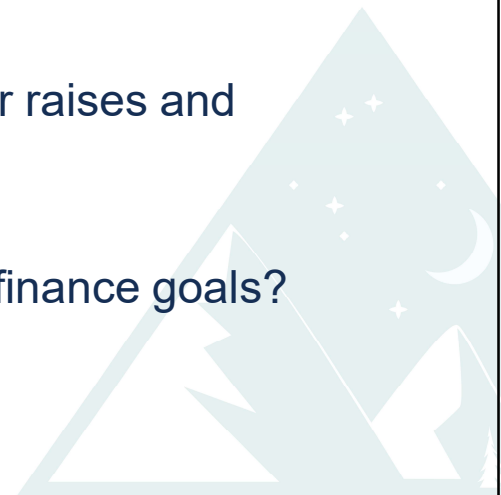
Listening and Empathy

- Shut up and listen
 - Clear your mind – minimize distractions internally
 - Ask questions – this is all about “not you”
 - Allow for awkward pauses/silences
- Hear what someone is saying
 - Open your ears and your mind
 - Discover their need for the conversation
 - Do they need assistance or just “listening ear”



Financial Literacy

- Budgets and Accounting
 - Software Licensing costs
 - Team Salaries – including funds for raises and promotions
 - Who “owns” the budget?
 - Who “creates” annual budget and finance goals?



Entity Hierarchy Savvy

- Where do you and your team fit into the larger organization?
- Are there organizational “cliques”?
- Who knows where the bodies are buried?
- Who knows all the gossip?
- Who knows how to get things done?
- Is the power in administration, legal, finance, or Medical Staff?
- Can you leverage your “savvy” or do you need to learn how?

Human Resource Comprehension

- Annual Reviews
- Approving Time Off/Sick Leave/FMLA
- Promotions and Raises
- Job Descriptions/New Job Listings
- Salary Issues
- Employee disputes/issues/discipline
- Peer/Supervisor disputes/issues

Peer/Mentor Connection

- MSP Peers – NAMSS Membership Directory!
- Peers with entity but maybe not w/in your department – Business Managers, Financial Liaisons, Data Management Team Leads
- Mentors – NAMSS Mentorship Program
- Your Legal Counsel/VPMA/Immediate Supervisor
- Succession Planning

Structured/Organized

- This is often the hardest one to learn/keep going
- Essential to keep on top of your work and the work of your team, group, department, organization, etc.
- Responsible to yourself, your team and your direct leadership and your organization

How do I assess what I need?



ABOUT MEMBERSHIP EDUCATION CERTIFICATION ADVOCACY TOMORROW'S MSP®

TOMORROW'S MSP®

TOMORROW'S MSP SELF-ASSESSMENT

The NAMSS Tomorrow's MSP® Self-Assessment is designed to help you assess your current career milestones, and discover areas of strengths and development. At the end of the Self-Assessment you will receive a personalized report that can support your journey to becoming Tomorrow's MSP®...today!

START TOMORROW'S MSP® SELF-ASSESSMENT



48TH EDUCATIONAL CONFERENCE & EXHIBITION

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Personal/Professional Assessment Worksheet

| Professional Skills | Today (1/1/24) | 6 Months Now |
|---------------------------------|----------------|--------------|
| Communication | | |
| Spoken | 50% | 80% |
| Written | 75% | 75% |
| Computing | | |
| Microsoft Office Suite | 80% | |
| Credentialing Software (symplr) | 80% | |
| Other Software (Adobe) | 60% | 75% |
| Common Sense | 75% | |
| Good Listener | | |
| Shutting Up | 40% | 60% |
| Empathetic | | |
| Hearing what someone is saying | 40% | 70% |



#NAMSS24

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Additional information

- <https://www.namss.org/>
- <https://www.forbes.com/councils/forbescoachescouncil/2021/06/17/new-to-leadership-15-effective-ways-to-transition-from-team-member-to-manager/>
- <https://www.jodymichael.com/blog/becoming-manager-no-one-tells/>
- <https://hbr.org/2023/09/how-to-develop-a-5-year-career-plan>
- <https://capd.mit.edu/resources/make-a-career-plan/>
- https://www.indeed.com/hire/c/info/setting-short-term-career-goals?gad_source=1&gclid=CjwKCAjwuMC2BhA7EiwAmJKRrHguQ7_pD5U9FNOtuiO1NadT2IA4X0Vd1uhdkEFyX4zmeclRpQzyQhoCW_MQAvD_BwE&hl=en&aceid=&gclidsrc=aw.ds
- <https://www.princetonreview.com/quiz/career-quiz>
- <https://your.yale.edu/work-yale/learn-and-grow/career-development/career-assessment-tools>

Thank YOU!





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| | |
|---------------------|--------------|
| Employee Name: | |
| Date: | |
| Current Title: | |
| Current Strengths: | 1 |
| | 2 |
| | 3 |
| | 4 |
| | 5 |
| Development Needs: | 1 |
| | 2 |
| | 3 |
| | 4 |
| | 5 |
| Professional Goals: | 1 |
| | 2 |
| | 3 |
| | 4 |
| | 5 |
| Step 1: | Action: |
| | Objective: |
| | Measurement: |
| | Timeframe: |
| Step 2: | Action: |
| | Objective: |
| | Measurement: |
| | Timeframe: |
| Step 3: | Action: |
| | Objective: |
| | Measurement: |
| | Timeframe: |
| Step 4: | Action: |
| | Objective: |
| | Measurement: |
| | Timeframe: |

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| | Measurement: |
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| | Objective: |
| | Measurement: |
| | Timeframe: |

| Professional Skills | Today (date) | 6 Months Now | 1 Year from Today |
|-------------------------------------|---------------------|---------------------|--------------------------|
| Communication | | | |
| Spoken | | | |
| Written | | | |
| Computing | | | |
| Microsoft Office Suite | | | |
| Credentialing Software (name) | | | |
| Other Software (name) | | | |
| Common Sense | | | |
| Good Listener | | | |
| Shutting Up | | | |
| Empathetic | | | |
| Hearing what someone is saying | | | |
| Financial Literary | | | |
| Budget/Accounting | | | |
| Entity Hierarchy Savvy | | | |
| Human Resource Comprehension | | | |
| Annual Reviews | | | |
| Promotions/Raises | | | |
| New Hires | | | |
| Issues/Disciplinary Actions | | | |
| Peers/Mentors Connection | | | |
| Structured/Organized | | | |
| Data | | | |
| Notes | | | |

TO USE:

Add or remove skills as needed to reach your next level of career progression

Honestly give yourself a GRADE (A to F or 100% to 0% for example) in each of the skill categories for TODAY

Highlight those areas for improvement overall and within the NEXT SIX MONTHS

Using the "Career Progression Worksheet" plan on activities you need to complete/explore to improve your grade within six months

Keep up with progress and regression

Tomorrow's MSPs® must acknowledge drivers of change and embrace the evolution of the profession in order to survive, succeed and grow.

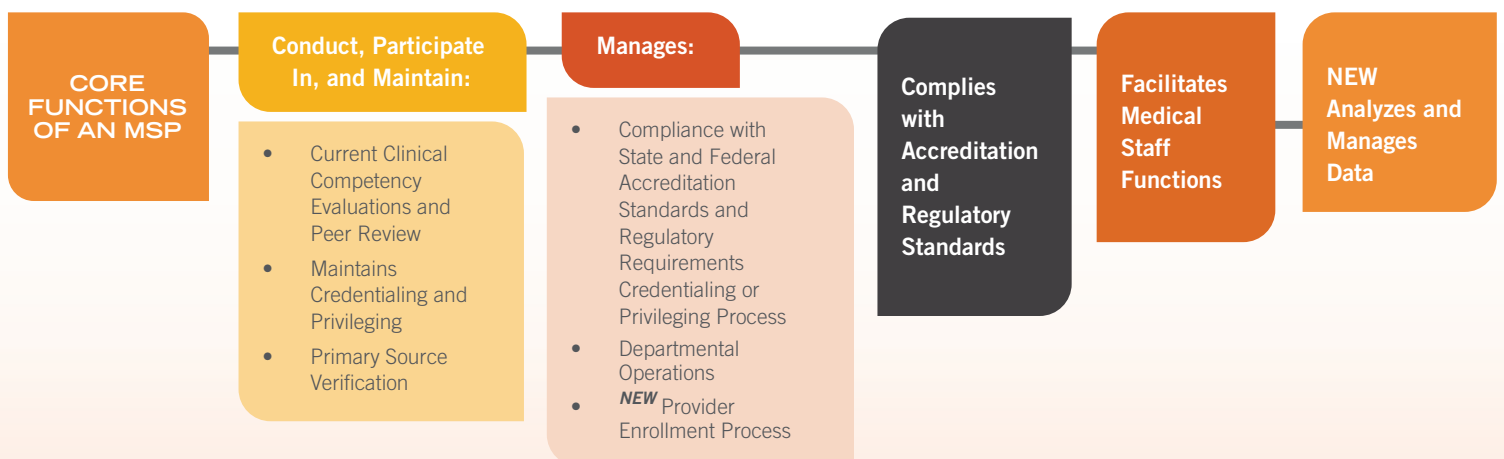
OUR LANDSCAPE IS EVOLVING



VERY ESSENTIAL SKILLSETS BY STATE OF CAREER

As MSPs grow in their career, the number and type of very essential skillsets grow as well.

| Skillsets | New to Field 0-4 Years | Certified 5-14 Years | Management 15-24 Years | Executive 25+ Years |
|--------------------------|---------------------------|-------------------------|---------------------------|------------------------|
| Analytical Thinking | | • | • | • |
| Communication | • | • | • | • |
| Confidentiality | • | • | • | • |
| Flexibility/Adaptability | • | • | • | • |
| Legal | | | | • |
| Political Savvy | | | | • |
| Professional Ethics | • | • | • | • |
| Professional Presence | | | • | • |
| Project Management | | | | • |
| Relationship Building | • | • | • | • |
| Team Building | | • | • | • |



Tomorrow's MSP® starts **TODAY**.
Visit NAMSS.org/TomorrowsMSP for more resources.

MSPs are the gatekeepers of patient safety, holding important roles within their healthcare organizations. With the introduction of new technologies and healthcare delivery models, the role of the MSP continues to evolve.