The Art of Steering: Insights of a Nurse Executive

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Abstract

In November 2015 the Executive Leadership Team in a Wisconsin hospital began a SEAM intervention. This paper describes the learnings of the Chief Nursing Officer after two years of intervention. The work led to changes in management practices, especially in time management and delegation. The article describes an important realization that the role of a leader is a group effort and not a solo effort. The author's self-discovery through the process was also important. In learning how to become a better leader, she wrestled with the reasons for overworking and micromanaging, as well as how to change these habits. To date, the intervention has been a journey of individual and group self-discovery that has resulted in more efficient management practices, better organizational culture, and more humane workplace.

Key words: socio-economic approach to management, SEAM, healthcare, rural hospitals, executive leadership

As Chief Nursing Officer at a 25-bed Critical Access hospital in Wisconsin, I have been involved in many change initiatives and efficiency improvement initiatives, such as LEAN, Patient and Family Centered Care, Participative Management, Team Empowerment, to name the few. I learned to treat these projects with curiosity, yet with some share of skepticism. Many past initiatives were very exciting, new and shiny, however seemed to fade away and turn into the "flavor of the week, month or year." So, when the CEO introduced Socio-Economic Approach to Management (SEAM) at one Executive Leadership Team meeting in the fall of 2015, I, based on my past experience, was somewhat skeptical and did not know what to expect.

The Executive Leadership Team discussed the need to implement some changes in the organizations and whether SEAM would be a good fit. SEAM's philosophical principles and the change process seemed appealing. With its focus on the human element, SEAM looked like an appropriate change methodology for health care. We discussed all pros and cons, and decided to move forward with the SEAM intervention.

The intervention process

The intervention started from the top, which means we, as the Executive Leadership Team, had to experience change first-hand, so we could model the change for the rest of the organization. SEAM consultants interviewed all members of the Executive Leadership Team,

and fed results back to us in two consecutive feedback sessions, Mirror Effect, and Expert Opinion.

Shocking realization. During the Mirror Effect, the team realized some issues that caused much frustration for us. Each of us worked long hours and very hard, yet as a team we were not successful. We did not have the right data to make informed decisions and often we would make decisions without including all of the stakeholders. We lacked effective and timely communication and cooperation between silos and departments. We did not consistently hold our employees and managers accountable. We did not have a process in place to manage conflict, nor were we comfortable dealing with it. The Mirror Effect shocked us in that it shattered our illusion that we, as organizational leaders, were effective.

We realized we needed to change. We were very eager to fix those issues right away, overnight, perhaps in a week, and be different, and be successful. We were disappointed when consultants told us that what we heard were only the symptoms of the problems. We needed to address the root causes of these problems, so they do not appear again. We had to wait another month for the second feedback session, which at that point seemed like eternity. Looking back, I did not notice how quickly that that month passed. However, waiting - not jumping into fixing everything right away - allowed us to reflect on problems. We heightened our awareness of things that did not work well.

The journey of improvement. A month later, we had the second feedback session, Expert Opinion, during which the consultants provided their analysis of root causes of our problems. Some of the root causes were lack of our steering the organization, poor communication systems and lack of synchronization between different parts of the organization. In the end, the consultants outlined some directions for improvement and suggested four baskets to address the major problems.

1. Clarify roles of Executive Leadership Team members, including what is expected when there is conflict or differing opinions.
2. Improve how Executive Leadership Team members manage and communicate about strategic decisions to the rest of the organization. This includes helping the people who report to Executive Leadership Team prioritize their work.
3. Develop and implement a plan of integrating clinics in the organization.
4. Develop and implement a plan to have more positive and collaborative relationships with providers (physicians and nurses)

Each basket is a collection of issues that need improvement, thus a basket may consist of several improvement projects. For example, our first basket included three related projects: 1) defining criteria, responsibilities for each role of an Executive Leadership Team member; 2) setting expectations about difference of opinions in the group and agreeing on how to manage conflict; 3) defining the scope of decisions made at the executive level and developing an effective decision-making process.

As we began working on Basket 1, at first it seemed very easy to us. Two months later, we reported to the consultants that we completed the basket. The consultants helped us recognize that the basket was not completed, as we resolved only some superficial problems, without addressing deeper issues. We dealt with symptoms and not underlying causes. For example, we were unable to be completely honest with each other at times, which had a detrimental effect on the whole organization. We, as a team, tended to avoid conflict and when we disagreed with others, we were reluctant and uncomfortable to challenge them. By the way, one of the projects in the basket was about identifying a healthy process to work with different opinions. So, we had to start over in identifying different pieces of the problem and addressing them one by one.

Good leadership is a group effort. As time went on, not much work was done on the first basket, although we were tackling some other problems. It was difficult to schedule time to work on the first basket and no one really took charge of the project. Every time we met with consultants, we would have a lot of excuses, such as not having the time to work on the project due to being busy with other commitments. I recall one meeting in which we were going through our usual excuses of not having time to work on the basket. After hearing the reasons of why we did not have time to complete the project, the consultants pointed out that *not having* the time to work on the project was not the issue; the issue was *not making* the time to work on the project.

When I reflect on that incident, I see how not having time was an excuse to cover up our ineffective leadership. The real issue was lack of honest communication and trust among the team members. First, lack of trust did not allow us to be open with each other and have an honest dialogue about everyone's needs. Second, lack of trust made everyone feel the need to be part of the project team, in case something important will be discussed or decided without one's presence. Trying to schedule a meeting for a large group was problematic, as people were busy and worked on different schedules. If the project was run by a smaller group and later brought to a larger group for consensus, then the process would have been less time-consuming and more effective. To fast forward, I want to say that we did complete that baskets and put an effective decision process in place. A series of retreats off-site with some open and honest discussions about our teamwork helped us to rebuild trust among the team members.

One major realization for me was that even if each individual on the Executive Leadership Team had outstanding performance, collectively we could not succeed if we did not work as a system. Historically and culturally, we had a tendency to work individually and strive to be the best in what we do, forgetting that it is the team that has to be excellent, not an individual. Working as individuals while being in a group fosters the siloed mentality and leads to turf wars. Each of us worked in our own areas and our priorities were not aligned. So, I had to reconsider how I saw myself and the group.

We are a system, not a group of individuals. Thus my success, the team's success and the success of the organization depended, in part, on the Executive Leadership Team performing well as a system. And once I accepted this, I began to see how important it was for us to support

each other. I also began to take the time to reflect on strengths and weaknesses in myself. This naturally led to acceptance of the strengths and weaknesses of my colleagues and to see them as human beings, not just people holding a leadership position in the organization. The essence of the group is that people have to work as one entity, not as a bunch of individuals. The SEAM process helped us to become a cohesive team where individual talents are complementary, making the results and outcomes more significant.

Better management practices. One of the projects of the first basket related to timely and effective decision making. As a group, we had a tendency to lack agreement on some topics or make a decision without having the right information to support the decision. While we started to use more formal tools to assist the group in decision making, we still continued to operate in the old way. For example, in the past, making a decision about adding staff or modifying a staffing model would be delayed from one meeting to the next due to limited data and lack of agreement among the Executive team members. So we implemented a SBAR proposal system, which stands for the **S**ituation, **B**ackground, **A**ssessment and **R**ecommendation. Directors and mid-level managers were supposed to bring a SBAR proposal to the Executive Leadership Team with the rationale and analysis in respective areas. However, we did not have clear rules and expectations about these proposals, so some proposals were lacking critical information needed for our review, and thus we could not make decisions on some of them.

Currently, we have implemented a new process in which the expectations are very clear and the SBAR proposals are screened in advance by HR Director and Finance Director. The new process became more efficient and has led to a better use of time of the Executive Leadership Team. It has also enabled the Directors to better understand the process – now they are better prepared, and they are learning new skills and competencies in terms of assessing needs and planning new processes.

Magical thinking. Our team was introduced to the concept of magical thinking (Conbere & Heorhiadi, 2016). Magical thinking may take different forms and one of them is believing that one can do more than is possible in the allotted time. We, as the Executive Leadership Team, and the organization in general, were infected by magical thinking. As result, we felt stressed, hopeless and overwhelmed. Now I can see that we were, and at times still are, delusional in our belief that we can do more work than we actually can do.

Magical thinking was very alive and well at our organization. We continuously were adding more tasks without removing any from our plate. We were overwhelmed and because we could not it all, we felt defeated. The priorities of different silos were not aligned well so we could not achieve our strategic goals with the resources we had, which led to huge stress. We were not steering our employees and were complaining about their poor performance. Most of leaders had an unhealthy habit of working long hours and emailing at all hours of the day; it felt like we were on duty all the time.

Yet the biggest magical thinking, I believe, was that the managers and the rest of the organization, seeing our behavior, would behave differently. "Do as I say, not as I do" was a poor management approach. No wonder everyone else was also caught by magical thinking as well. Magical thinking was causing some unresolved conflict, burn-out, frustration, and feeling of failure.

Learning about magical thinking helped us to understand the unhealthy patterns in our behavior and gave us permission to bring this topic out in the open. Our Executive Leadership Team group talked a lot about abandoning "magical thinking" and the need to really focus on our priorities and accept that we cannot do everything, in order to steer our organization towards the strategic goals. We worked on issues such as reducing emails, realistic time management, better work/life balance and decreasing some of the unnecessary administrative work. Thus, I realized that steering starts with setting reasonable and realistic expectations for self and my employees. I realized it was not healthy to exhibit behavior that is contrary to what we expect others to do.

I still chuckle when I think of the time when I thought I could do it all and felt proud of the long hours put in completing tasks, much like the winner in a contest. In addition to working long days, I was constantly putting out fires and coming to someone's rescue. I attended many unnecessary meetings, completed routine tasks that could have been done by someone else and did not make steering of my silo and organization a high priority.

Another form of magical thinking is trying to implement initiatives without having necessary resources to do so. I recall those times when we tried to implement new programs and initiatives without making sure that the organization had the capacity to launch a major project at a given time. We did not adequately plan to ensure that the programs or initiatives had necessary resources and that the right processes were in place to sustain the performance before moving on to the next major change. Several projects come to mind, however one stands out.

We had an organization-wide committee to implement a new initiative. The project leader did an excellent job in developing an implementation plan for this initiative. However, the project leader did not have buy-in from the Executive Leadership Team members, who were focused on other projects going on at that time. We, the Executive Leadership Team, tried to slow down the initiative, but did not speak up in a concerted manner to express our concerns. The new initiative was rolled out and the department directors were informed that they would educate their team members at their respective department meetings. Looking back, I see that this initiative was implemented without a realistic training plan, follow-up plan, or metrics to assess the initiative's effectiveness. As result, people were confused, as they did not have the right competencies and skills to do required work, so they were resistant and did not comply. In the end, we had to retrain employees later again, so the time and resources were wasted. Table 1 shows the hidden costs (the value of wasted time) that occurred because the program was pushed through without thorough planning of all pieces, buy-in of all stakeholders, and proper training of employees.

Table 1.
Hidden cost calculation for the failed initiative

Category of employees involved	Number of employees involved	Time used to train employees, hours per person	Total Time, hours	Total Hidden Costs, $
Team Members	600	1	600	$40,800
Directors	40	4	240	$16,320
Project Leads	20	1	20	$1,360
Total	660	6	860	**$58,480**

Conscious effort to make changes. To help us to overcome magical thinking, we began to use SEAM management tools. Each of the Executive Leadership Team member completed a Time Management Tool and a Priority Action Plan. As I worked on my Priority Action plan, it became very apparent that I would not be effective if I were to continue at the current pace. At the same time, I recognized the need to make a change in my work/life balance due to personal circumstances. I needed to make some personal changes as the Executive Leadership Team made its way down the new path.

During the time of the SEAM intervention, there were some dramatic changes in my personal life which provided a different perspective on life and work, commitments and relationships, leadership and management. As I celebrated the gift of life and kept walking in faith, I vowed to make positive changes in order to care for myself and spend quality time with my family. This was an eye-opener. And yes, it was easy to say but not easy to do. So, it did not take long for me to fall back into my old habits. A few months after my personal crisis, I was back to the same routine of spending long hours at work, doing a lot of routine operational tasks, and neglecting my family.

That was a time of reflection and revelation for me. I recognized that the reason I was working long hours was to cope, or perhaps avoid, the stress in my personal life. This was an "aha" moment for me and it resulted in a Priority Action Plan revision and a recommitment to getting healthy and abandoning magical thinking. With the assistance of my SEAM coach and a lot of self-reflection, I personally began to truly recognize the difference between managing and steering.

Mastering the Art of Steering

The SEAM intervention process, along with making organizational changes, also has impacted me as a person and fostered my personal growth. I began to reflect more often on life-work balance, on what is important in my life, and what I have to learn. I spent quite a lot of time

self-reflecting, especially looking at myself as a leader. I realized that leading an organization is a very important, complex, and rewarding task. SEAM has a better word for leading – steering. Steering is aligning people's efforts and organizational resources to achieve organizational strategic goals (Conbere & Heorhiadi, 2017). It has elements of leading and managing. As we progressed with SEAM in our organization, I started to learn the difference between traditional leadership and steering.

Letting go of control and trusting employees. In the past, I had been promoted to different leadership positions in part due to good follow-through, attention to details, and my knowledge across the organizational system. My style of management was really focused on knowing all the details in all the departments that report to me. I tried very hard to know what was going on everywhere! I had an elaborate system of checking up on the leaders that reported to me and making sure that the tasks were completed. I wanted to be present in every activity, I took pride in my ability to know every small details of operations. This management approach gave me a sense of accomplishment. However, with SEAM, I began to recognize that this style was not sustainable.

First, it was another form of magical thinking. It was not possible for me to know everything and to be able to control everything. Second, it was not effective. At that time, I thought that the Directors, reporting to me, appreciated my management style, however looking back, I could now see that I was micromanaging. Directors were frustrated with my micromanagement. I had to reflect on my management, and my relationship with employees.

In retrospect, I realized that when I was absent due to my personal life crisis, my colleagues took on many of my responsibilities. They attended meetings, completed projects, took key roles in my respective programs, and did everything I would do if I were at work. They were very supportive during this time and were completely capable of doing those tasks. Then, I realized, that they always were capable, and it was I who was holding them back. I was the one who did not allow them to reach their full potential. Now, as I think about this, I can see that it was arrogant to think that without me, the other people will not do well. So, I needed to change my thinking pattern to really *let go* and let them grow. For myself, I made a distinction between management and steering -- letting go of micromanagement and over-controlling. People are very capable of doing work they were hired to do.

Focusing on a bigger picture. As our organization grew, my role as Chief Nursing Officer had changed and the expectations had expanded. At the same time, I still wanted to be on top of everything, so I kept getting into the details of every small operation. One day it dawned upon me that being on top of every detail is not a leader's job. This realization happened when I was signing off on invoices for lettuce for the kitchen. I found myself in the weeds (pun intended). As a leader, I was supposed to think more broadly and look at the bigger picture. Yes, my comfort zone might have been digging into operations, but this is not what I was supposed to do as a leader.

SEAM helped me recognize that by focusing on the big picture and by letting go of the micromanagement, I could be a much more effective leader. My value added as a leader is not being a doer. I have to steer my departments and organization towards strategic goals. To steer successfully, I also need to spend time steering my people, developing my mid-level leaders. To be honest, I must say that some days, I want to complete routine tasks which in the past gave me a sense of accomplishment. Yet, when I find myself doing those routine tasks, rather than spending time developing leaders and team members, I ask myself, "Am I steering or being a passenger?" By the way, the phrase "signing off on lettuce" became an in-group joke and very instrumental in helping the members of the Executive Leadership Team to recognize when they lose a focus of a big picture. The moment we see a peer getting into operational tasks, we jokingly remind the person, "Are you signing off on lettuce?"

So another element of steering is focusing on the bigger picture. Rather than doing day to day operational tasks, leaders have to wrestle with strategic issues and have a bigger vision.

Growing people's potential by delegating. In addition to the intervention process, SEAM introduces socio-economic management tools. Our Executive Leadership Team was trained in these and coached in the application of these tools. One of the tools was the Delegation Tool. Of course, leaders talked about the need to delegate all the time and I personally thought that I was a pretty good in delegation. At the same time, I saw that we did not have the right tools and information to make sure that the delegation was successful. With the Delegation Tool we examined every task to be delegated, and identified the level of decision-making authority of a person to whom the task was delegated.

The delegation tool has been very effective in the development of new leaders in our organization. Frequently, leaders in our organization are promoted to a management position if they have showed great leadership potential and excellent clinical or technical skills. In the past, my monthly meetings with those newly promoted leaders would focus on very detailed operational issues. However, this left very little time to discuss planning of high level issues and new projects. The delegation tool was very helpful to identify the level of authority to make different decisions and set expectations regarding communication about these decisions. Having this tool has been very effective in building the confidence level of newly promoted leaders and ensuring that decisions are made at the right level by the right people.

New leaders also learned to utilize this tool with their own department managers and team members, allowing them to perform to their highest potential. Proper delegation leads to better decisions, higher team member engagement, and their job satisfaction. So, delegating is another element of steering that makes a leader more effective.

Being self-aware. The SEAM journey also helped me recognize that in order to improve my steering and be a good leader, I needed to be more self-aware. Our organization established a goal to build up leadership competencies in all leaders across the organization. As a part of the goal, a series of training sessions on leaders' self-awareness was organized. Training gave all

leaders the common language and concepts to understand some interpersonal communications. The leaders were introduced, among other concepts, to Argyris's Ladder of Inference and the Johari window. The Ladder of Inference taught us to examine our assumptions when we inferred the motives for other people's behaviors. The Johari Window helped us examine the extent to which we were aware of our own assumptions, and underlined the need to give and receive feedback.

It is one thing to know the concept but another to make it part of your life. It is easier to talk about anything when it does not pertain to you. It is harder to see it within. For example, in one situation I was making some statements to a colleague regarding a conflict, and she asked if I had just climbed the ladder of inference. I had to pause and think, and indeed, I had climbed the ladder of inference, and I had jumped to an assumption without the facts. Yet I was glad the colleague used the learned concept and pointed out my behavior of which I was not aware at that moment. People have blind spots, especially when it comes to their own thoughts, feelings, beliefs, and assumptions. These assumptions will shape people's behavior that they are not aware of but need to work on. And this is why, in order to become more aware, people have to welcome feedback.

I learned that if I do not get feedback, I will not be able to grow. However, to provide honest feedback, people need to feel safe and there must be a level of trust and respect. I believe I provided the safe environment for people to share their feedback with me. This is how I learned that I needed to listen more, interrupt less, give people choice, and choose the wording so they do not feel judged. This may be a work in progress for me, but I can say I did notice change in myself.

I think that through the SEAM process, I became a better leader. And this is not my assumption. I make this statement based on my observations as well as feedback from my employees. Our meetings are more productive, people feel more relaxed in voicing their problems. They feel freer to disagree with me if they have a different opinion. But what is more important is that I feel more relaxed, freer and more at peace with myself. I have a wonderful team of managers who are capable of doing good work without me trying to control everything in this life.

Summary

To summarize, the SEAM intervention has been both a professional and personal journey for me. And as with any journey, there are some detours, wrong turns, and bumps in the road. I have been a nursing executive for 20 plus years and I thought, based on people's feedback, that I was a pretty good leader. However, SEAM helped me realize that I had to relearn some things in my leadership role. It is also humble to realize that I needed to change some beliefs and

assumptions about what good leadership is in order to become a more effective leader. As I reflect, on the essence of good steering, or leadership, the following things stand out for me:

- Being a cohesive team member rather than a good individual performer;
- Developing leadership potential of employees through delegation, not micromanagement;
- Abandoning magical thinking, in other words, being realistic about what one can do well in a reasonable time frame;
- Using the SEAM management tools;
- Being self-aware through continuous self-reflection and seeking feedback
- Remembering that people are holistic human beings, with feelings and ability to make mistakes, and all need to be respected.

The SEAM intervention has provided an opportunity for me to grow as a leader. My leadership growth is especially important at this point in my career, when I focus on working to my highest potential and try to help others to do the same. I can see the link between steering the organization and providing a high-quality care of patients, families, and the communities we serve.

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