

SOLUTION: The Leadership Bundle: The Why and How to Create the Standard Work of Leaders



BUILDING A LEADERSHIP BUNDLE

The tasks & tactics in the leadership bundle are not *extra* work, they are how we do our work as leaders.

Leaders are hired to:

- Manage **the current state** by tending to day-to-day operations
- Envision and create **a better future state** by leading individuals, teams, and the entire organization forward and higher

Managing the Current State	Leading toward a Better Future
Reactive	Proactive
Short term focus	Long term focus
Consumes a large amount of time and energy	Robbed of time and energy
Leaders often oriented to these tasks	Leaders not often trained/mentored to these tactics



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Easier accountability systems	Accountability systems lacking
Strong pull to stay the same	Requires change
Management Task Driven	Leadership Tactic Driven
Tasks are simpler to define	Tactics are more abstract
Unique to organization	Global to practice of great leadership

First things first: What is a Bundle?

- It is a set of practices, when used collectively, create a significant improvement in work.

What is Standard Work?

- It is a detailed definition of the most efficient method to produce a product (or perform a service) at a balanced flow to achieve a desired output rate. It breaks down the work into elements, which are sequenced, organized and repeatedly followed.

Put them both together, and what does a standardized Leadership Bundle feel like in your organization?

- At its best, it documents a current "best practice" and ensures that it is implemented throughout your organization.
- With standardization, work becomes more stable and predictable - which translates into daily peace of mind . Leadership becomes easier- Leaders feel like they got “ great work done” in a day, week, month and year.
- Important goal of standard work is to decrease wasteful motion, instead of becoming increasingly more difficult with barriers and repeated missteps.



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- Standard work comes from teams and is continuously improved. Your leadership team works in synergy and becomes one. Relationships form when a group of leaders have shared experiences. That is also the very definition of TEAMwork.

And.....

Teamwork makes The DREAM work!

Following is an example of a Leadership Bundle. Think of this as communicating to your leaders the expectations placed upon them in a very clear and direct manner.

Provide a checklist to combine those things that are the **tasks** of **management**(payroll, scheduling, budgets), and the **tactics** of strategic and **innovative** leaders.

An Example of Leadership Bundle Efforts:

Leadership Responsibilities Checklist

EXAMPLE: Leadership Responsibilities Checklist

DAILY	√	Notes
Rounding (Employee, Inter-departmental, Physician)		
Validation (Patient) Rounding		
Daily Safety Briefing (DSB)		
Communicate/Follow Up: Rounding & DSB		
Direct Dialogue (Compliment, Call-Out)		
WEEKLY		
1 Thank You Note to Home & Recognition Tool Kit (minimum)		
Forward One Suggested Thank You for VP/CEO to send		
Honor Sacred/Vital Time		
BI-WEEKLY		
Payroll		
Update/Communicate Scorecard/Metrics		
MONTHLY		
Monthly Accountability Meeting		
Financial Operational Assessments by XX day of month		



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Departmental Staff Meeting (start at Comm. Board)		
Update Communication Boards		
Scheduling		
Nomination for Monthly Employee Award		
PRN		
Formal Feedback – Coaching/Correction		
Employee-engaged, behavior-based selection/onboarding		
30 Day Meetings &/or 90-Day Evaluations-New Hires		
Implement Approved Suggestion: Employee Suggestion Program		
Provide Training to Peers (leaders as teachers)		
Word of Mouth/Community Connections (promotion/marketing)		
QUARTERLY		
90-Day Goal/PDSA Action Plans (Jan 1/April 1/July 1/Oct 1)		
Celebrate goal progress/wins		
Attend Leadership Training & Complete Road Map		
Promote attendance at Employee Forums		
BI-ANNUALLY		
Promote attendance at Employee Training Events		
ANNUALLY		
Annual Employee Evaluations		
Annual Goal Development		
Fiscal Year Budget – Per Budget Schedule		
Attend Employee Service Awards		
Participate in Annual Healthcare Week Celebration		
Mid-Year Conversations (Coaching)		
Employee Engagement Survey Promotion & Follow Up Actions		
Mandatory Education		
Participation in 1 Community Board or Major Community Event		

** Please note: The bundle may be different at different levels of leadership (e.g., senior leader rounding may have a different frequency and process than front line leader rounding). Senior Leaders are not exempt from having their own leadership bundle. In fact, it communicates a strong message for all leaders when senior leaders transparently communicate the work they do.

Who will build the bundle?



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We recommend that the Steering Team (including all Senior Leaders) dedicates time to building your Leadership Bundle at your meeting held after your quarterly leadership training.

At the beginning of your journey, your leadership bundle will be small. (The leadership responsibilities checklist shown in the example is very advanced.) It may contain few tactics of leaders and many tasks of managers. Your Leadership Bundle will grow after each training when leaders learn something new and an expectation is clearly stated for training to be placed into practice.

The leadership training and development is meant to be “Learn-Do- Learn-Do”. Leaders will leave the training with a “to-do” list which is called the Road Map. This road map will be taken to their next Monthly Accountability Meeting, and the Senior Leader and Front-Line leader will discuss what the training meant to the Front-Line leader and how he or she will put the learning into practice.

So, for the Steering Team’s purposes, how a Leadership Bundle is built:

- 1 Define your current state. What tasks do managers do each day, week, month, quarter and annually?
- 2 Create a Road Map prior to each quarterly leadership training. Make sure the Senior Leaders on the steering team are aware that they need to completely agree with the Road Map, as they will be setting expectations and seeking alignment and accountability from their leaders. (see Leadership Development and Training Solution in Steering Team section).
- 3 Explain the expectations of the Road Map at your quarterly training (Best Practice: This is the CEO job to begin and end a training).
- 4 Encourage leaders to take the Road Map to their monthly accountability meeting and let them know to discuss their “why” and “how” at that meeting.
- 5 Add the Leadership Tactic to your Leadership Bundle, and Leadership Responsibilities Checklist quarterly.

Grow your bundle!



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A Reminder...

- *What to leave out of your bundle is just as important as what to put in*
- *What should we not include?*
- *What should we stop doing?*
- *What is best left to the autonomy of the individual leader?*

Our recommended best practices:

- Make sure you include leadership training /development on the Leadership Bundle for your newest leaders. Think of the bundle as their orientation checklist!
- Use the bundle as your skills competency checklist for leadership in your organization!
- Key to sustaining your bundle is to have internal champions designated for each piece of the bundle. These peer champions will be the leaders who teach at leadership training when it is time to “Study/Adjust/Refresh/Reinspire” a tactic in your bundle. They will also be internal experts that leaders can go to with questions. They can teach new leaders in a standardized fashion! Make sure that you take the extra step to designate an internal champion for each tactic in your bundle. It is worth it.



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