

CareForum 2022

The WellSky® Conference

Succession – It's Not Just a TV Show

Creating Continuity in Healthcare Leadership

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Director of Physical Medicine
Willis-Knighton Health System

Jeremy Dye, PT, OCS

Performance Improvement Coordinator
Willis-Knighton Health System

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Today's speakers



Amy Sudduth, PT

Director of Physical Medicine
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Performance Improvement
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Willis-Knighton Health System

Key Takeaways

1. Plan ahead by being proactive with a succession plan that has identified candidates to replace key team members.
2. Develop strategies for increasing the professional development of the identified candidates.
3. Set yourself up for success with a plan to maintain business continuity and quality during succession.

Importance of Succession Planning

Harvard Business Review (2016)

- Each year 10% to 15% of all corporations must appoint a new Chief Executive Officer (CEO)
- Extended searches for CEOs cost shareholders \$1.8 billion in value
- Only 54% of corporate boards are grooming a successor
- 39% of corporate boards reported no viable internal candidate for CEO
- Companies with integrated executive development programs have long-term superior operating performance

Importance of Succession Planning

Why Don't Companies Have a Plan?

- Caught up in the moment
- Avoiding the inevitable
- Natural selection
- No easy answer



Succession Planning

Traditional Business Model

- Focused on replacement for CEOs, key financial positions
- Fear avoidance behavior by CEO
- Complicated by family if single founder
- Foundation of workforce is often ignored

Importance of Succession Planning

Why Do Companies Need a Plan?

- Continuity
- Conflict
- Certainty
- Candidate recruitment



This is the plan? Really?



Succession Planning

Tech Sector Model

- “All-in-one” leadership structure during start-up
- Succession model tends to change once established
- Focuses more on succession beyond the CEO
- Tries to build stability in functional units if Initial Public Offering (IPO) looms
- Less “loyalty” from employees than traditional model

Succession Planning

Healthcare Organizations

- Burnout is more prevalent in healthcare
- Clinical excellence doesn't always translate to administrative success
- Replacement often influenced by educational requirements
- Covid-19 has created opportunities for plan overhauls

Basic Principles of Succession Planning



Basic Principles of Succession Planning

- Be proactive when identifying leaders, developing a plan
- Pinpoint candidates for specific roles
- Make effective and open communication a priority
- Invest in professional development
- Do a trial run
- Integrate succession into hiring strategy



Succession Planning

Basic Principles – Be Proactive

- Think about how the present and future interact
- Start during the interview
- Honesty is the best policy
- Play the matching game

Succession Planning

Basic Principles – Pinpoint Candidates

- Identify your rock stars
- Don't guess, use tests
- Learn the traits of the job
- Play the matching game

Succession Planning

Basic Principles – Make Communication Effective and Open

- Convey opportunities to interviewees
- Inform employees of plans and potential opportunities
- Be honest
- Be open to feedback from employees, especially valued ones

Succession Planning

Basic Principles – Invest in Professional Development

- Career ladder
- Utilize tools in your toolbox
- Provide an opportunity
- Self assessment is crucial
- Be a healthcare Yoda

Succession Planning

Basic Principles – Do a Trial Run

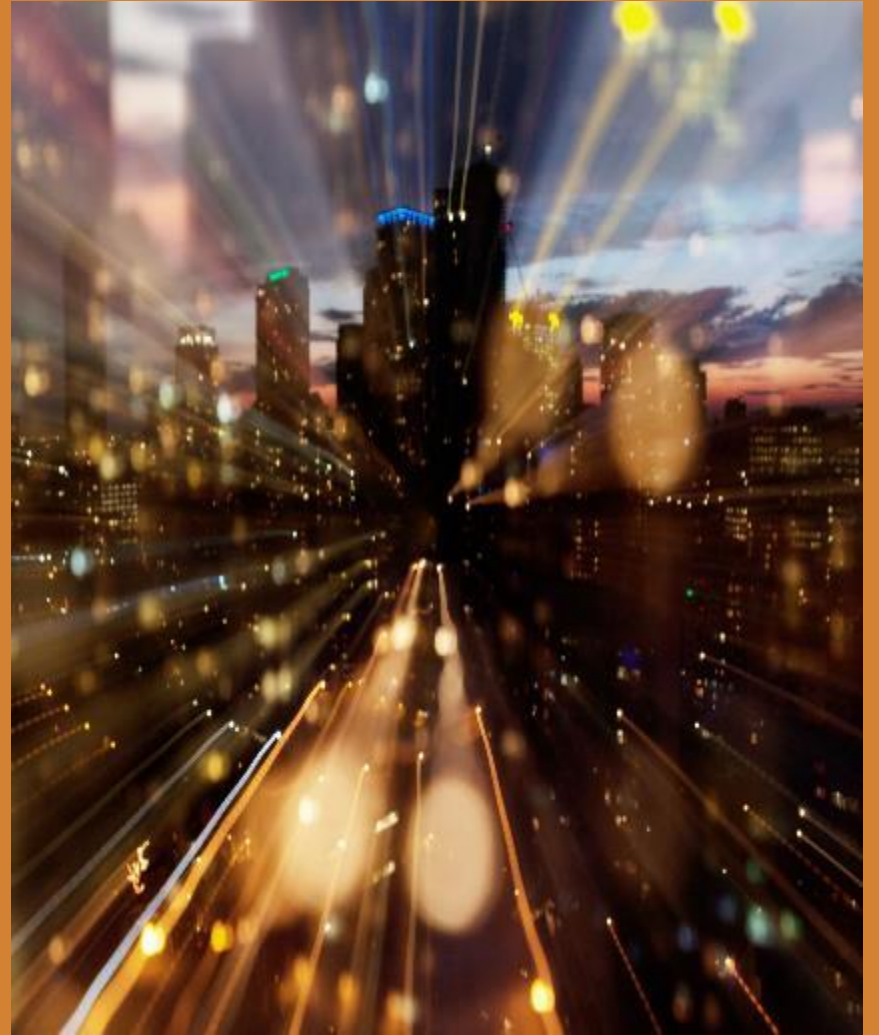
- Trial runs are great sources of information
- Use orientation to your advantage
- Allow the leaders to lead
- Ensure teamwork is a valued commodity
- Be prepared for some backlash

Succession Planning

Basic Principles – Integrate

- Think about the plan during interviews
- Consider previous issues with a particular position
- Consider questions based on leadership
- Experience of applicants can be vital
- Consider staggering ages for continuity

Succession Planning: Perspectives



Succession Planning: Healthcare

The Employee's Perspective

- Most new healthcare hires are concerned about level of mentoring
- New and younger employees are less interested in long-term financial gains from succession due to exponential rise in healthcare education costs
- They are interested in how a job or career fits into his or her daily life, with an emphasis on work/life balance

Succession Planning: Healthcare

The Employee's Perspective (cont.)

- They want a job with a mission
- Social justice and inclusivity are important
- Transparency is important
- Employers that are cutting edge/technologically proficient are attractive

Succession Planning: Healthcare

The Employer's Perspective: Under Further Review

- If the healthcare succession plan does not consider importance of replacement to lower-level positions, referrals may be impacted
- When promoting an employee to a new position, assessment of that employee's performance at their previous position can help frame the needs of the position in order to best determine their replacement
- Lack of plan affects both continuity and quality

Succession Planning: The WK Story



Succession Planning: The WK Story

- Willis-Knighton Health System originated in 1924 as Tri-State Sanitarium
- It was sold in 1928 to Dr. James Willis and Dr. Joseph Knighton
- It transitioned to a not-for-profit healthcare organization in 1949 and in 1950 was named for Doctors Willis and Knighton
- Since that time, the health system has grown to include four acute-care hospitals, one hospital dedicated to inpatient rehabilitation and behavioral medicine, and numerous other campuses housing outpatient rehabilitation services, physician clinics, diagnostic services, and more
- In 2021, Willis-Knighton's CEO of 56 years retired and was replaced by a 30 year tenured employee (Senior Vice President) from within the system. Our current CEO is only the third CEO in Willis-Knighton history.

Succession Planning: The WK Story

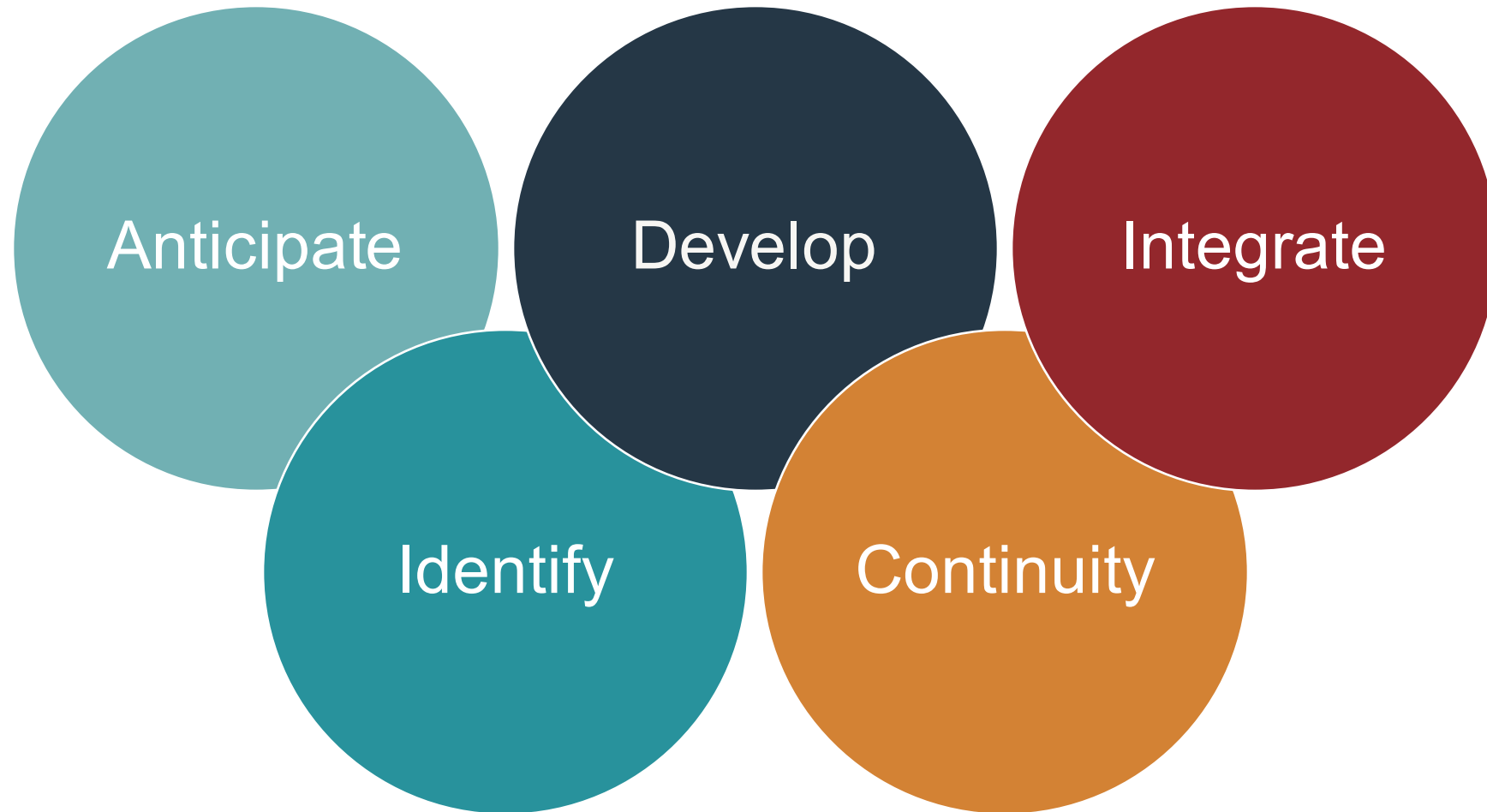
- Who we are
 - An organization that is the exception and not the rule in many ways
 - An organization that believes in promoting from within
 - An organization that demonstrates a culture of growing/investing in staff competency
 - An organization that while in a large twin city has a community feel
 - Second largest non-government employer and economic engine for our area
- Our mission statement:
 - To continuously improve the health and well-being of the people we serve

Succession Planning: The WK Story

- Age considerations
- Following a very tenured leader
- CARF standards

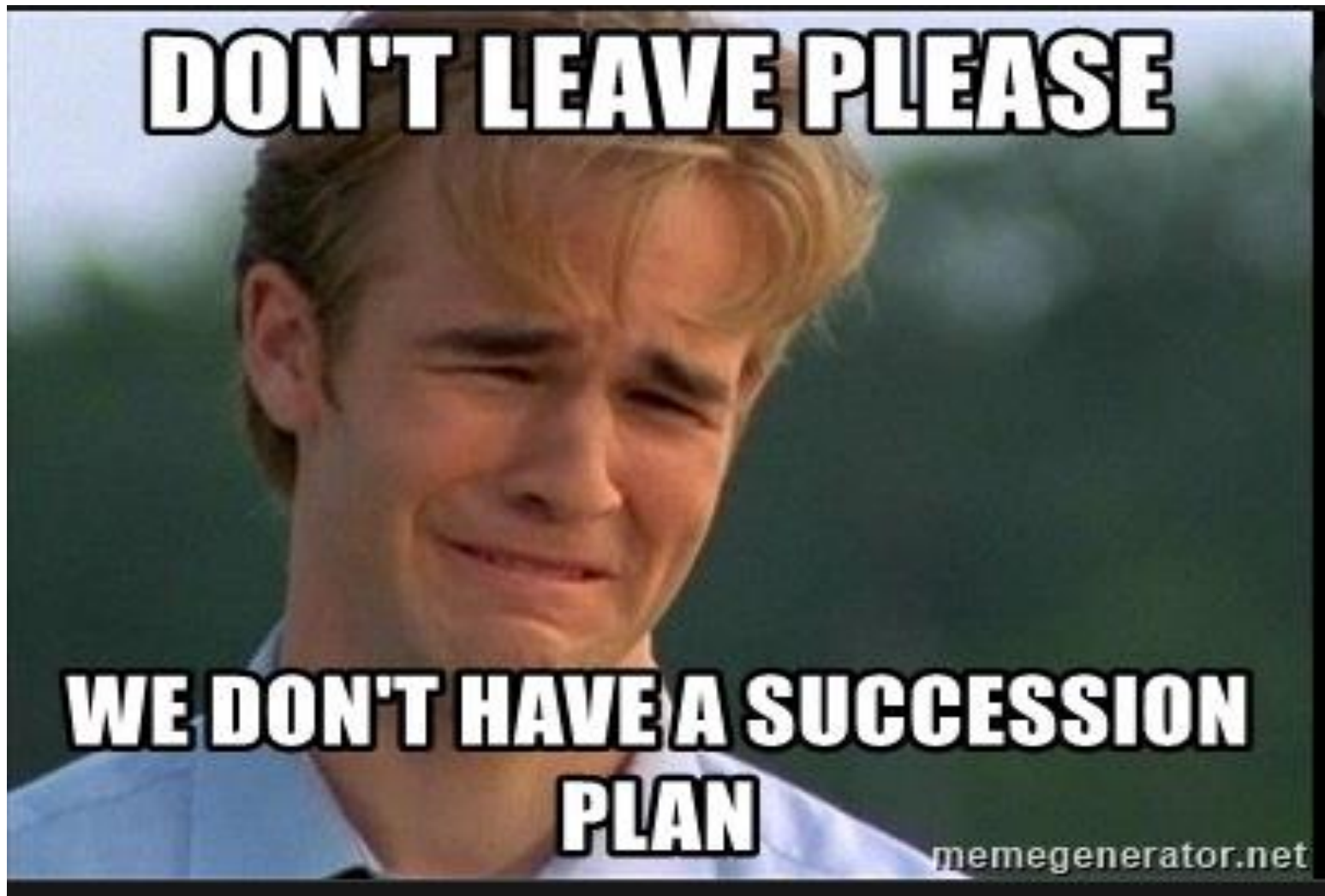
Our Succession Stories

Succession Planning





“One day, this will all be yours. But right now, I need you down in the warehouse.”



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Thank you.

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