

## **CQ Case Study:**

### **A Hospital's Executive Team Leads a Full Asset Merger**

In the healthcare industry, change is a way of life. C-level healthcare executives deal with new regulations, technologies, and procedures, all while ensuring the highest level of service to their clients.

A stellar example of this drive to embrace change is the Sisters of Charity Hospital in Buffalo, New York. The hospital recently experienced a merger (with St. Joseph's Hospital), which involved meshing personnel and practices. And as part of the national Catholic Health System, it must accommodate corporate as well as federal and industry mandates.


Under the leadership of Peter Bergmann, President and CEO of the Sisters of Charity Hospital, the executive team took the CQ® Assessment developed by Dr. Barbara Trautlein, principal at Change Catalysts, LLC. "Most executive teams are change leaders," asserts Trautlein. "The team at Sisters of Charity wanted to apply all their talents wisely and efficiently because like most healthcare organizations, they face multiple challenges at the same time. The CQ Assessment is a way to understand and deploy individual strengths to support the entire organization, bolster communications and provide valuable information so everyone is working toward the same critical objectives."

Bergmann praised the CQ Assessment as a "great tool to use before going through change. You need to know what your competencies are and what comes naturally to you, as well as what improvement areas you need to focus on to make the change successful."

#### **Identify What You Have in Your Toolbox**

The 15-minute CQ Assessment characterizes individual change leaders according to their styles (Coaches, Champions, Visionaries, Drivers, Executors, Facilitators and Adapters) as identified by their emphasis on Heart (motivational), Head (strategic) or Hands (tactical). During the assessment, Bergmann states, "We all had an epiphany that you need certain competencies on a team and ideally have people on the team representing each style to lead through change."

As Trautlein explains, "When you are faced with change, you need motivators, you need strategic thinkers and you need people to execute the change. If an organization attempts change without all three, the change won't take hold. For example, even the most highly motivated team still needs the practical tools, training and skills to accomplish the tasks that make change possible. They need Executors and Drivers as well as Visionaries. The CQ Assessment identifies the right people for the right leadership task and gives an organization the information it needs to embark on changes that stick."



Bergmann favorably compares the CQ Assessment with standard personality tests. In his opinion it is more useful than assessments like the Myers Briggs Personality Inventory to lead change at the C-level. “Individuals in my position,” he says, “should be able to adapt. The CQ Assessment is not about whether you personally fit or do not fit. The CQ Assessment looks at the complete executive team and what you have in your toolbox. It gives me insight into my team’s ability to lead change and what we need in the future.”

Another drawback of many other personality and career tests is the time they take. By contrast, the CQ Assessment, in Bergmann’s words, “is short and not onerous. It doesn’t sap our resources and it is engaging, worthwhile and useful.” In organizations that are stretched for time and resources, a tool that helps them quickly recognize and effectively position leadership talent is very welcome.

### **Create a Good Communications Plan**

The nursing team at Sisters of Charity Hospital is pursuing Magnet Status, which is an award given by the American Nurses’ Credentialing Center (ANCC). Hospitals with Magnet Status achieve excellent patient outcomes with a nursing staff that is engaged, has low turnover, is encouraged to advance in medical practice and fosters open communication with each other and with other members of the healthcare team. At Sisters of Charity Hospital, the effort to qualify for Magnet Status is led by Mary Dillon, Vice President of Patient Care Services and Chief Nursing Officer. Dillon participated in the CQ Assessment with three of her direct reports.

The CQ Assessment confirmed for Dillon that “so far we have recruited individuals who have the ability to embrace change. As a group we discussed our results and they made the process more transparent for the whole team. We had a good discussion and it will help us to identify the areas where we should get more training or assistance. The CQ Assessment also encouraged individuals and the group to appreciate their differences so they could see what part of change would be tougher or easier for each of them. People need to be aware of how they can handle a situation; it’s how you get better at what you’re doing. The CQ Assessment absolutely helps with that.”

Dillon noted that it is sometimes difficult to get a full team on board with changes, as individuals worry about the effect of a change on their personal lives and careers. “People become derailed and we stop making forward progress. The CQ Assessment lets us talk about this and work through the fears. From my observations of change, the biggest opportunity is to have a good communications plan. If you communicate right, you have much less disruption, especially at the bedside level. It’s all about the continuum of care.”



## Provide Insights Beyond Information

As Senior Director of Human Resources at Sisters of Charity Hospital, David DeLorenzo is expert at assessing the different needs of people in a change situation. “I thought the assessment did a good job of lining me up to my role and where I see myself. It validated that I am very balanced and an Adapter. The other participants realized that they can come to me as a checkpoint in their decision making, and I could see them in their roles. It gave us a good opportunity for a dialog.”

DeLorenzo has observed that his recent hires are looking for immediate involvement and inclusion. “The CQ Assessment can help us involve them in decision making. We can tell what they will bring to the change process. It’s a valuable tool for the senior leadership team. Without a lot of time committed on the front end, you get significant insights beyond mere ‘information.’”

The CQ Assessment is grounded in psychology and neuroscience, real life experience managing complex transformations and extensive testing in the field. “The CQ Assessment is a key component of Change Catalysts’ proprietary CQ System for leading change,” says Trautlein. “We help all types of organizations deal with change, whether the impetus comes from outside, from regulatory bodies, corporate mandates or industry-wide pressures, or is entirely internal. The CQ Assessment provides C-level executives with information and insights about themselves and their team and with the confidence of knowing exactly what they can do as leaders to accelerate and consolidate change.”

DeLorenzo sums up the experience of the Sisters of Charity team: “You leave the assessment with a feeling of excitement. It’s a win-win.”