

# ENGAGING PHYSICIANS

A MANUAL TO  
PHYSICIAN PARTNERSHIP



®

STEPHEN C. BEESON, MD

# ENGAGING PHYSICIANS

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## A MANUAL TO PHYSICIAN PARTNERSHIP

*“Dr. Beeson’s new book couldn’t have come at a better time. His step-by-step approach to achieving powerful collaboration with physicians is the perfect prescription for what is needed to deliver on the promise of clinically excellent and compassionate care. This new manual should be required reading for all healthcare executives and physician leaders who aspire to create a better future for their patients and themselves.”*

—David S. Fox, President, Advocate Good Samaritan Hospital

*“Dr. Beeson skillfully and systematically lays out a road map for empowering physicians to lead the change in healthcare delivery. This proven methodology provides the structure and skills for physicians to hold each other accountable for providing excellent care. This book is a must-read for physician and healthcare organization leaders who wish to take charge in creating systems of safe, efficient, and effective care. The kind of care you want for yourself and your family.”*

—Ken Davis, MD, Chief Medical Officer,  
San Antonio Methodist Healthcare System

*“Engaging Physicians fills the gap created by **Hardwiring Excellence and Practicing Excellence**, serving as a ‘how-to’ manual to guide practices in their efforts to build a culture of service excellence. Dr. Beeson, with his vast experience in medical system organizational change in his own *Sharp Experience*, as well as nationally through his coaching, lays out step-by-step the methods to inspire physician engagement. He also provides the tools organizations will need to train physicians to improve the quality and service of the healthcare they deliver to every patient, every time.”*

—William Storo, MD, Pediatrician, Dartmouth Hitchcock, Concord, NH

The following pages are excerpts from the book titled  
*Engaging Physicians: A Manual to Physician Partnership* by  
Stephen C. Beeson, M.D.

It is provided as a sample of the book's content in order to  
give the reader a sense of what the actual book is like.

**ENGAGING PHYSICIANS**

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**A MANUAL TO PHYSICIAN  
PARTNERSHIP**

**Stephen C. Beeson, MD**

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## FOREWORD

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Here are some of the most frequently asked questions and statements I have received from healthcare leaders:

- “How do we engage the medical staff?”
- “Are the physicians going to do this?”
- “What about the doctors? You know their behavioral issues.”
- “Our biggest challenge is the physicians. They are not loyal to the organization. They keep moving profitable services to their offices.”

Here are the most often asked questions and statements I hear from physicians:

- “You would think they would ask us what we think.”
- “How can they do this when they can’t even get the nurses to have the charts when they call me?”
- “Why don’t they hold people accountable?”
- “How come no one says anything to me when things are going well? The only time I hear from administration is when there is a problem or they want something.”
- “Why do they keep wasting money on consultants and programs? I can tell them what they need to do.”
- “The only ones who get treated well around here are the surgeons because they bring in the money.”
- “They favor the docs they employ versus us, the independent physicians.”

- “Wish they would ask *me* sometime. I have given hours of free time to the hospital with little thanks for it.”

I see organizations where there is excellent collaboration between the organization and the medical staff. I also see the consequences when good alignment is not present. When physician partnership is in place, patient care is better, staff enjoys work more, and the physicians find a much more effective and efficient place to take care of patients, conduct research, or provide their diagnostic skills. When this happens administration enjoys their work more, the organization performs well, and the quality of life in the entire system improves.

The question is *How do leaders build a collaborative, cooperative relationship with physicians that earns physician loyalty and engages physicians to work toward a shared agenda?*

Dr. Beeson has followed up his best-selling first book, *Practicing Excellence*, geared for practicing physicians in office settings, with his newest book, *Engaging Physicians: A Manual to Physician Partnership*. This book will answer the challenging and repetitive questions leaders have about “getting physicians on board” and build the structure to align physicians in a mutually beneficial partnership. Written by a physician, the book is loaded with treatment plans and prescriptions on how to best gain collaboration for excellent care.

In the last four years, Dr. Beeson has had the opportunity to facilitate Studer Group sessions for healthcare leaders, present and teach in organizations, and harvest best practices throughout the country. He also interacts often with Studer Group coaches in their work. This work, combined with his work and leadership role in his medical group, has given him the unique experience of seeing life on both sides of the fence.

His book *Engaging Physicians: A Manual to Physician Partnership* shows how to take the fence down and keep it down. Today’s healthcare environment is tough, and organizations that execute in quality, safety, and service will win. Most organizations do not have

the time or resources to waste that comes from physicians and administrators moving in different directions and pursuing different goals. Dr. Beeson has become a specialist in helping leaders work with physicians in a genuine spirit of “win/win,” where physicians, the organization, and patients all benefit.

I met Dr. Beeson through our work with his organization. In our early work with the system, our work was moving too fast for some and way too slow for physicians. Lesson one: Physicians’ and non-physicians’ sense of time are vastly different. What is quick to a non-physician can appear slow to a physician.

One day I received a call that Sharp Rees-Stealy Medical Group had appointed a physician to lead the work to hardwire excellence and would be attending the Taking You and Your Organization to the Next Level training session. Dr. Beeson’s attendance helped impact his own practice with the Sharp Rees-Stealy Medical Group, where patient satisfaction increased from the 13th to the 89th percentile during the time of his appointment.

With the success of his work, organizations requested to learn more. To that end, Studer Group created a Physician Institute for physicians. Dr. Beeson is one of our lead facilitators. He also wrote *Practicing Excellence*, which has sold over 50,000 copies to-date, to help physicians provide better care to patients. He speaks across the country to some of the best healthcare systems in the country on physician engagement and physician performance improvement.

With this book, Dr. Beeson reaches out again to make healthcare better. Dr. Beeson could easily present on his work and do very well financially. But he chooses to limit these for now to stay close to his two loves: his family and his patients. After these two loves, he makes time for a third one: the desire to make the quality of life better for physicians, staff, patients, and their families.

Quint Studer

## INTRODUCTION

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Sometimes we end up in places we didn't plan to go. That certainly has been the case for me. I am a practicing family medicine physician with the Sharp Rees-Stealy Medical Group in San Diego, California, where I have maintained an active clinical practice for the last 15 years. I am married to my beautiful wife, Deanna, and am the father of two amazing kids, Sydney and Nicholas, who are 12 and 10 at the time of this writing. Practicing medicine and raising a family were the parts of my life that I had planned.

The part of my life that I didn't plan began in 2002. Sharp HealthCare, made up of four hospitals and three medical groups, including Sharp Rees-Stealy, launched a systemwide effort to transform the healthcare experience for employees, physicians, and patients. We called our effort "The Sharp Experience."

Prior to this new organizational commitment, we had considered ourselves the leader in our competitive marketplace, and certainly a very good integrated system by most standards. In an effort to get a more precise "state of the system," Sharp HealthCare leadership wanted to dig deeper to find out how things were going at the front line. Focus groups were conducted involving staff, physicians, and patients to find out how we rated as a place for employees to work, physicians to practice medicine, and patients to receive care. Though the results were "okay," we were clearly not as good as we thought we were. Something different needed to be done, and the search for a change strategy began.

In 2000, after an intensive cross-country search and significant due diligence, Sharp HealthCare partnered with Studer Group, a healthcare outcomes firm with a proven record of transformational results. The goal of the partnership was to execute a cultural shift and take Sharp HealthCare to the next level.

Goals were established, leadership was developed, staff was trained, strategies were formulated, and action plans were initiated. Despite vigorous initial efforts, the deeply seeded culture of “we are pretty good” was more challenging to shift. Our burning platform for change was lukewarm, at best. Being “pretty good” was never the ambition of Sharp HealthCare or any members of our leadership team. The first year of the Sharp Experience yielded minimal improvement and was certainly not the “transformation” that was the intention of our new organizational commitment.

One year after the launch of the Sharp Experience, with little change in our performance measures, an annual employee opinion survey was conducted to take the pulse of the workforce. The result of the survey provided us a diagnostic glimpse into our struggles. The leading dissatisfier for our employees was not pay, work conditions, benefits, or complaints about “administration.” The most important and lowest performing issue for our employees was the conduct and behavior of our physicians. Our front line employees were frustrated with physicians not doing what the rest of the staff was trained and required to do. They asked, “If the Sharp Experience is so important, and we are held to such high standards, why aren’t the physicians doing it?” Physicians were not included in the launch of the Sharp Experience because the leadership team wanted to get our “house in order” prior to getting physicians involved. We began to realize we had made a strategic error.

We significantly underestimated the impact of the “non-engaged,” uninvolved physician. We coached and trained staff members who would spend much of their day interacting with physicians who had little working knowledge, awareness, or support

of the “mission” of the system. Our staff saw physicians as the leaders of the clinical care team, and they would do as they saw their leaders do. We trained our staff in a new commitment to service excellence, while our physicians continued in the old way of doing things. The impact and sustainability of service training efforts were lost as our staff gravitated to the conduct of physicians. Physicians became unknowing obstructionists to system change based on a failure to access their partnership, support, and leadership.

The awareness of physicians’ influence on our staff was one thing. Doing something about it was something else, entirely. For the Sharp Experience to work, our leadership team realized that physician alignment, engagement, and participation had to happen. We needed a strategy to reach our physicians to make them part of the collective effort. Our team was also keenly aware that administrators standing in front of physicians and asking them to “get on the bus” was not going to work. The message of the Sharp Experience needed to come from a physician as a colleague-to-colleague gesture. It was becoming clear that a new physician position was in evolution. That is when the unplanned part of my life began.

In 2002, I was appointed by our board of directors to be the physician champion for the Sharp Experience. My directives were to bring the Sharp Experience to physicians, and to clarify and train the physician role in a systemwide effort. Our goals were to create physician involvement and support for the Sharp Experience and to improve physician performance in quality and service. I was tasked with the daunting challenge of creating physician behavior change and generating physician loyalty to a broad, grassroots change strategy.

After a slow and difficult beginning, the Sharp Experience journey was beginning to work. We coached, trained, measured, benchmarked, and partnered with physicians to achieve our goals. Results in patient satisfaction and quality began to materialize as

physicians and staff worked together to improve patient care. Patients were noticing, and a sense of pride and accomplishment began to spread throughout the organization. The Sharp Experience was transforming who we were, and began to unify our workforce to achieve something extraordinary. The Sharp Experience became our identity, our signature, and what we became known for in the community.

In 2007, we gained national recognition by winning the Malcolm Baldrige Quality Award. Two of the Sharp Hospitals, including our main Memorial Campus, and the Cabrillo Nursing Facility received Magnet designation by the American Nursing Credentialing Center for excellence in nursing practice and patient care. In the same year, the Sharp Rees-Stealy Medical Group was an honoree recipient of the prestigious American Medical Group Association Acclaim Award. In 2008, Sharp Rees-Stealy was ranked the number one group in the state of California in clinical quality and the patient experience for the third consecutive year, a ranking compiled by health plans rating over 200 systems.

I had the opportunity to meet with healthcare leaders who were embarking on similar journeys and were challenged by the prospect of getting physicians engaged. I heard the same questions, frustrations, obstacles, and concerns from clinic, hospital, and emergency room leaders from across the country. Leaders realized that physician participation was a key to effective change, but solid guidance on this front was sparse. I wanted to help. I wanted to be a part of making healthcare better and to help foster system and physician partnerships so patients would benefit.

In 2005, I was invited to serve as a medical director for Studer Group. I received requests from systems across the country to coach and train physicians to improve clinical and service performance. Though physician morale has been under assault on a national scale, I found hope, optimism, and aspiration from physicians everywhere I went. Physicians wanted to be better, and were willing to lead the

way. It was an intense and promising time, and I began to compile the strategies that were working to improve physician performance.

In 2006, I wrote *Practicing Excellence: A Physician's Manual to Exceptional Health Care*. My purpose was to provide physicians guidance to improve the care provided to patients and the work environment they created for themselves and their staff. *Practicing Excellence* was written to help physicians be professionally successful by providing training and skills that every physician needs but very few receive.

Though *Practicing Excellence* was written to improve physician performance, it left many questions unanswered and challenges unaddressed. As I spoke with healthcare leaders, I heard consistent and recurrent challenges. How do we get physicians involved? How do we restore physician loyalty to our hospital? How do we get physicians to care about what we are doing? How do we appoint a physician champion? What does a physician champion do? How do we improve patient satisfaction with our affiliated medical staff? What do we do when physicians vocally protest change efforts? How do we create strategies where physicians and hospitals work hard to achieve goals together? These recurrent leader challenges were the inspiration for this book.

*Engaging Physicians: A Manual to Physician Partnership* will take leaders on a stepwise, staged journey to engage physicians in a systemwide effort and align physician behavior to achieve worthy, evidence-based organizational goals. *Engaging Physicians* begins with Stage 1, "Create and Communicate Organizational Vision and Goals." This stage takes leaders through the creation of a compelling organizational vision that is boldly projected throughout the organization. Clarity of direction and communication of vision are requirements for enrolling physicians in a unified, shared agenda. Workforce unity will determine the success of change efforts.

Stage 2, "Leadership Development and Accountability for Performance," is a guide to assembling a high-performance

leadership structure, built to achieve outcomes based on a proven “evidence-based leadership” model. Effective leaders who do as they say and execute outcomes earn the respect and loyalty of physicians. A high-performing leadership team with a track record of performance builds credibility, a prerequisite to physician engagement.

Stage 3, “Establishing Physician Confidence and Trust,” is a specific guide to creating the facility of choice for physicians. By delivering a best-in-class physician experience, physician receptiveness and willingness to participate in the shared agenda are created.

Stage 4, “Building Physician Leadership,” progresses to developing an effective and aligned physician leadership structure including the traditional structural leadership team, as well as the role of physician champions.

Stage 5, “Training Physicians,” is about investing in the medical staff using a proven physician training model. An organization that helps and supports physicians through evidence-based training is a powerful alignment strategy by clarifying physicians’ roles in the organizational effort and providing worthy guidance to make them more successful.

Stage 6, “Physician Measurement and Balanced Scorecards,” instructs leaders on performance feedback and data reporting to drive and improve outcomes delivered by physicians. If properly applied, performance feedback can be one of the most effective physician improvement and behavioral change strategies.

Stage 7, “Implementing Physician Behavioral Standards,” is about the creation, implementation and communication of behavioral standards currently required by the Joint Commissions.

Stage 8, “Managing the Disruptive Physician,” provides specific leader guidance on managing violations of a code of conduct, historically one of the most dreaded and poorly performed leadership activities.

Stage 9, “Recognizing Physicians,” provides simple tactics to recognize physicians. Physician recognition remains one of the most important drivers of physician satisfaction and is a high-yield activity for building physician relationships with the organization and its leadership team.

*Engaging Physicians: A Manual to Physician Partnership* is a distilled method of changing physician behavior and creating willingness, and even enthusiasm, to participate in system-based care. The independent, isolated physician’s renting of a hospital room to care for patients was done yesterday. Today and tomorrow are about physician partnership, collaboration, and leadership to deliver evidence-based medicine, superior outcomes, and exceptional service where nurses, physicians, and administration work together to achieve shared goals.

The process of engaging physicians is among the most important strategies to transform healthcare performance. Physicians will make or break the culture, performance, and reputation of the institution and can accelerate or unravel quality, safety, and service efforts. Physician participation in a system effort is based upon factors and conditions that many healthcare leaders fail to realize, and these well-intentioned leaders can wonder in utter frustration why physicians do the things they do.

Physicians are selective and deliberate in engaging in an organizational change strategy. In the end, physicians will do for the organization what the organization has done for them. Physicians will partner with administration when trust and confidence in the leadership team are built, clinical efficiency is demonstrated, and physicians have meaningful input on organizational efforts. When physician alliance is created, physicians will be an organization’s greatest champions, will expect more of themselves, will recruit their colleagues, will appoint physicians who align with the mission, and will leverage their influence to change culture. The highest performing healthcare systems in the country are led by engaged,

aligned physicians who work passionately and collaboratively to implement superior, evidence-based care and extraordinary service as a unified commitment.

Physicians and health system leaders want the same things. We depend on each other to achieve our mission to improve care for our patients and improve the work experience for our staff and ourselves. Let's go on this journey to get this done.

## ABOUT DR. BEESON

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Dr. Stephen Beeson is a nationally recognized speaker who has provided tools and tactics for engaging and training physicians to hundreds of medical groups and hospitals and thousands of physicians throughout the country. In September of 2006, Dr. Beeson released his book *Practicing Excellence: A Physician's Manual to Exceptional Health Care*. This national bestseller articulates a strategic, prescriptive, "how-to" approach to engage and train physicians to drive organizational performance.

Stephen Beeson is a board-certified family medicine physician practicing with Sharp Rees-Stealy Medical Group. In 2002, Dr. Beeson was selected by Sharp HealthCare leadership to serve as the physician fire starter for the Sharp Experience, an organizational commitment to service and operational excellence. Dr. Beeson's patient satisfaction ranks him in the 99th percentile nationwide, and the San Diego County Medical Society voted him as one of San Diego's Best Physicians in 2005, 2006, 2007, and 2008. Recently, Dr. Beeson was a recipient of the Center of Recognized Excellence Award for Individual Service Excellence, and Sharp HealthCare was the recipient of the prestigious Malcolm Baldrige Award for 2007 for organizational performance.

Dr. Beeson graduated magna cum laude from the University of California, where he also completed his medical school and residency training.

Dr. Beeson has authored, developed, and implemented physician training programs including the Sharp Rees-Stealy Physician Pledge, the Physician Performance Dashboard for patient satisfaction, the Physician Guide to Service Excellence, the Physician Excellence Award Program, new physician orientation and training, individual physician coaching, physician interviewing and selection processes, and the Acts of Excellence electronic physician training program. Dr. Beeson now brings these proven tactics to medical groups and medical staffs across the country.

Dr. Beeson is passionate about providing exceptional care to patients and works with Studer Group as a medical advisor, speaker, and physician coach to broaden the difference he can make with physicians across the country.

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# MAKE YOUR PHYSICIANS TRUE PARTNERS IN ORGANIZATIONAL CHANGE.

*“Dr. Beeson's step-by-step approach to achieving powerful collaboration with physicians is the perfect prescription for the delivery of clinically excellent and compassionate care.”*

—David S. Fox, President, Advocate Good Samaritan Hospital

*“A must-read for physician and healthcare organization leaders who wish to take charge in creating systems of safe, efficient, and effective care. The kind of care you want for yourself and your family.”*

—Ken Davis, MD, Chief Medical Officer, San Antonio Methodist Healthcare System



Too often, leadership teams struggle with physician involvement in quality and service initiatives. The failure to engage and involve physicians early in change efforts can significantly slow implementation in both the hospital and clinic environment. *Engaging Physicians*, by Dr. Stephen C. Beeson, shares a tested, staged approach to bringing these critical leaders on board.

A follow-up to Dr. Beeson's widely acclaimed and best-selling *Practicing Excellence*, this book offers a how-to approach to enrolling physicians in organizational change efforts and leveraging physician influence to transform culture. You'll learn how to:

- Create and boldly project a compelling organizational vision
- Assemble a high-performance leadership structure, built to achieve outcomes based on a proven evidence-based leadership model
- Select, develop, and activate effective physician champions to lead change
- Train and develop physicians using proven behaviors that dramatically improve clinical care and the patient experience
- Use performance feedback and data reporting to physicians to drive and improve quality and service outcomes
- Create, communicate, and implement physician behavioral standards consistent with an organizational vision
- Manage disruptive physicians in a proactive, fair, and consistent manner
- Recognize physicians in a way that generates physician organizational loyalty

“The intention of this manual is to help leaders and physicians care for the patient above all else, and to make the pursuit of saving lives and making a difference our shared purpose,” says Dr. Beeson. “When you can stand together, side-by-side with physicians, and when physicians become champions for the mission, your organization will become unstoppable.”

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