

Using CPP Assessments to Develop Insightful Leaders and Boost Workforce Vitality

Case Study of St. Luke's Revisited at the 18-Month Mark*



CASE STUDY AT A GLANCE

BUSINESS OVERVIEW

St. Luke's Hospital & Health Network emphasizes the concept of "workforce vitality," in which all leaders, staff, and volunteers feel valued and recognized from all levels of the network, viewing themselves as company advocates and the organization as an employer of choice.

CHALLENGE

In June 2007 St. Luke's conducted a survey to assess employee perceptions of managers' performance. Based on the results, managers were then asked to improve the scores but without coaching or other interventions. In 2008 St. Luke's conducted the survey a second time, which, despite indicating significant improvement since the first one, showed that approximately 25% of managers were unable to achieve the goal.

SOLUTION

St. Luke's OD team designed an evidence-based program linked to its core leadership competencies to place these managers in sync with top-performing managers. The program utilized CPP's CPI™ 434 and *Myers-Briggs Type Indicator*® instruments to tie areas of potential growth identified by the survey to psychometrically validated characteristics and preferences.

RESULTS

At the six-month mark following the 2008 survey, the OD team issued an abbreviated survey, the results of which showed 85% of participants trending positively. Notable improvements were achieved with regard to communication, stress management, and manager visibility with staff. These improvements, in turn, boosted satisfaction and engagement within the organization.

The OD team issued an additional survey at the 18-month mark, and the results showed 83% of participants still trending positively. This clearly demonstrates—given that no substantive changes were made to the program between the 6- and 18-month marks—the program's remarkable success in sustaining managers' improvement.

In August 2010 the Hospital & Healthsystem Association of Pennsylvania (HAP) recognized the St. Luke's leadership development program with a HAP Award in the "Workforce" category.

CONTINUING A TRADITION OF LEADERSHIP AND INNOVATION

Founded in 1872 in South Bethlehem, Pennsylvania, St. Luke's Hospital & Health Network has a rich heritage, well-established values, and a legacy of service. As one of the first hospitals in the country to use electricity and radiology, develop a proper surgical center, and establish a diploma nursing school, the company has a history of leadership and innovation within the medical industry.

Imbedded in the company's culture is the belief that people are its source of strength, evident in the stated goal of "striving to maximize the satisfaction of our employees, patients, medical staff, and volunteers." St. Luke's emphasizes a concept known as "workforce vitality," in which all leaders, staff, and volunteers feel valued and recognized from all levels of the network, viewing themselves as company advocates and the organization as an employer of choice.

As the executives tasked with leading the company's HR and organizational development initiatives, Robert Weigand, director of management training and development, and Tanya Markovich, director of workplace initiatives, continue the company's trailblazing tradition. In particular, they have implemented a series of innovative programs designed to enhance the vitality of the St. Luke's workforce by developing influential and autonomous leaders.

*Note: This case study, issued originally in spring 2010, has been updated to reflect the most recent data gathered regarding the effectiveness of the St. Luke's management intervention program.



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ORGANIZATION-WIDE SURVEY PINPOINTS AREAS FOR IMPROVEMENT

In June 2007 St. Luke's conducted its first formal network-wide employee opinion survey initiative. Managers throughout the organization were presented with survey scores reflective of their employees' perceptions of their performance as a supervisor; their opinions of the health of their workgroup; and their views of the organization as a whole.

Upon receiving the results, managers were asked to work toward attaining positive survey scores that fell into the "good to very good" range (65%–74%) when benchmarking against other large hospitals considered "best in class." Because this was the first survey of its kind for St. Luke's, senior leaders opted to allow managers to create development plans and work toward enhancing employee satisfaction on their own, without any type of individual or group intervention.

In 2008 St. Luke's conducted a second employee satisfaction survey, the results of which indicated a significant amount of improvement realized across the entire network. However, it was noted that approximately 25% of the management population was unable to achieve the improvement goal, with scores falling into "fair/mediocre," "yellow flag," and "red flag" areas according to the scoring criteria.

St. Luke's fosters a very supportive culture and a philosophy, driven by the CEO, in which the company works hard to give its people the skills they need to succeed. Those who are willing to become engaged are given the opportunity to grow, regardless of tenure.

"One of St. Luke's differentiators—and this is at the core of the concept of 'workforce vitality'—is that we strive to provide a work environment that brings out the best in all our people and allows strong leaders to develop," explained Weigand. "Our satisfied and energized employees, in turn, perform excellent work and provide superb service to our customers and patients."

Therefore, as survey outcomes prompted senior leaders to find out why this group was unable to achieve the stated goal, Weigand and Markovich were charged with designing an intervention that would address managers whose results fell into the lower tier of scoring criteria.

In combination with information provided by the surveys as well as a historical performance representation, these assessments laid the groundwork for meaningful, measurable change.

USING ASSESSMENTS TO BRIDGE GROWTH AREAS TO INDIVIDUAL DEVELOPMENT PLANS

Operating under the philosophy that leaders are responsible for the growth and development of their team, Weigand and Markovich designed a program that would enable these managers to identify underlying challenges and create individual development plans to address them. Specifically, the program linked to core leadership competencies of St. Luke's:

- Business acumen
- Command skills
- Development of direct reports and others
- Interpersonal savvy
- Self-knowledge
- Management of vision and purpose
- Customer orientation
- Accountability and responsibility

The program's ultimate goal was to place these managers in sync with top-performing managers and enable them to begin adding maximum value to their work while deriving greater job satisfaction.

Weigand and Markovich started from scratch to create a program that had never been tried at St. Luke's. Utilizing CPP's CPI™ 434 and *Myers-Briggs Type Indicator*® instruments as well as TalentSmart's *Emotional Intelligence Appraisal*® and the *Watson-Glaser Critical Thinking Appraisal*® assessments, they built a program that would tie areas of potential growth identified by the survey to psychometrically validated characteristics and preferences. In combination with information provided by the surveys as well as a historical performance representation (from a sampling of a significant number of managers in this group to identify negative trends), these assessments laid the groundwork for meaningful, measurable change.

Weigand and Markovich began the coaching process in April 2009. They stress that, from the outset, it was crucial to clearly communicate the intention to provide a positive leadership support/development process in order to allay fears and solidify in the mind of participants the expectations associated with the program.

An initial step involved giving all managers the aforementioned assessments and meeting with them individually to review the results. Based on the identified growth areas and the insight gained through the results of the assessments, they guided each manager through the process of creating an individual development plan—with input from each manager's supervisor—that provided a blueprint for progress. Meanwhile, Weigand and Markovich reported the "starting point" of each individual manager to the associate vice president.

In keeping with the company's commitment to helping its employees succeed, the program focused on long-term development, measuring participants' progress at the 6- and 18-month marks. "From the program's outset we planned to work with this group of managers consistently over an extended period of time," said Weigand. "Sometimes change needs to be hardwired into an individual, and we recognized that this doesn't happen immediately."

SELF-AWARENESS: THE KEY TO PROGRESS

Weigand and Markovich began meeting regularly with the managers in early July to focus on the areas targeted for improvement. Though the program was based on a fundamental structure, the coaching process itself was quite varied, tailored directly to the needs of individual managers. One of the primary goals of the assessment process was to increase managers' self-knowledge—a goal directly tied to the company's core competencies.

The CPI 434 and Myers-Briggs® assessments, according to Weigand and Markovich, play a crucial role in this program by bridging various areas of concern identified through the survey to identifiable preferences and characteristics. For example, a high score on the Dominance scale of the CPI 434 assessment could often be linked clearly to a manager's inability to obtain necessary feedback from his or her team. Linking this growth to a characteristic identified by a scientifically validated instrument enables the manager to discover ways to improve, in this case perhaps by altering behaviors that tend to stifle open discussion. "Without the benefit of the assessments,

we'd only have the survey data," said Weigand. "We'd be able to identify the areas for growth but not necessarily have a means to address them."

For some time now St. Luke's has relied heavily on the Myers-Briggs assessment for a number of training initiatives and also as a general source of information regarding the managerial staff. Consequently, at times during this program the Myers-Briggs assessment was used not just to identify the preferences of the managers involved in the program but also to enable them to better understand and identify with their staff.

"The majority of our managers have taken the Myers-Briggs assessment, and everyone's type is displayed on a chart that can be accessed through the company's intranet, which is available to all managers," said Markovich. "This has been tremendously useful in this program because it helps managers understand how they can work within the larger team."

GAUGING PROGRESS AT THE HALFWAY POINT

The initial surveys were intended to serve as a starting point on a path that would identify managers with room for growth and ultimately lead them to success. An important aspect of the year-long program, therefore, included obtaining feedback at the six-month mark. At that point Weigand and Markovich issued an abbreviated version of the original survey.

Those early results, it turns out, were very positive, with 85% of the participants trending positively and progressing toward their goals. "We were pretty amazed when we started pulling those numbers together," said Markovich. "With such notable progress occurring over a relatively short period of time, we were well on our way to a significantly improved leadership team."

Those results—in combination with a leadership self-assessment, a supervisor assessment, and an OD practitioner/coach assessment—were used to gauge progress. "The importance of the feedback portion of this program cannot be overstated," Markovich continued. "This information has provided critical reinforcement that shows participants that their efforts are truly paying off, and a means to recognize when plans need to be adjusted."

Additionally, as Weigand and Markovich pointed out, the data can be used to quantify the impact on the business based

on turnover and replacement costs, as well as the impact of managers' behavioral changes on their employees' perceptions and level of job satisfaction.

OPENING THE LINES OF COMMUNICATION

While Weigand and Markovich have noted improvement in varied spheres, a few common themes persist, such as communication. Markovich cites one instance in which a manager had been communicating with her team exclusively through e-mail. Plus, she often failed to communicate the reasoning behind her decisions and exhibited poor timing in her communication attempts—behaviors that are often demonstrated by individuals with a preference for Introversion, as indicated by the Myers-Briggs assessment, and a low Social Presence score, as indicated by the CPI 434 assessment.

Not surprisingly, this was a sore point for her staff, as indicated by the initial survey. Her personalized program, however, has given her the opportunity to identify these challenges and learn to communicate in a variety of ways to express her thoughts in a manner that elicits positive responses from people of varying personality types. She has also recognized the importance of adequately explaining decisions to her staff, as well as giving them ample time to digest information.

Weigand and Markovich also note that a commonly occurring challenge involves the inability of managers to hold people in their department accountable, commonly reflected by a low CPI 434 Responsibility score. "When managers tend to avoid conflict, fairness and accountability issues typically begin to appear," said Weigand. "As these challenges have been identified and addressed, we've seen significant improvements in the ability of managers to fairly hold their staff accountable for their work responsibilities."

They have also noticed significant improvement in the ability of these managers to "manage up." Challenges in this area were particularly reflected in managers with low CPI 434 Responsibility and Tolerance scores and high Good Impression scores. "In situations where they didn't agree with policies and decisions but didn't want to voice their opinions, some managers tended to shift blame up the chain of command, never communicating their opinions to their supervisor," said Markovich.

In many of these cases, the organizational development team has been able to help managers understand the

importance of expressing their opinions to the appropriate parties, overcome fears and other hurdles, and develop productive ways to voice disagreements.

VISIBILITY

The program has also helped identify and address challenges with managers' visibility with the staff, a common theme involving managers expressing a Myers-Briggs preference for Introversion as well as those with a low CPI 434 Social Presence score. In many cases, these individuals were under the perception that they maintained strong visibility with their staff, while, in fact, the staff felt very little and sometimes no connection with them.

Working with these managers, the team has helped them identify specific steps they can take to create a stronger, more positive presence with their staff. For example, some managers increased their rounds on all work shifts, while others started having morning huddles and regular staff meetings. One manager even began posting her schedule on the outside of her door, increasing her availability to the staff for open communication.

Consequently, as these managers have improved their own visibility, Weigand and Markovich have noticed a significant improvement in senior leadership visibility. As the role of these managers has been strengthened, so has the ability of their staff to relate to the company's senior management.

GETTING A "GRIP" ON STRESS

One of the more important improvements stemming from use of the Myers-Briggs assessment has involved the ability of managers to manage stress by identifying "grip" responses. Developed by Dr. Naomi Quenk and detailed in her book *In the Grip*, "grip theory" describes the Jekyll-and-Hyde phenomenon that can occur during times of heavy stress, in which people shift from their normal, "dominant" personality function to a latent, "inferior" personality function. However, because they are not as experienced at operating within their inferior personality function, they usually express it in a very immature way, resulting in aberrant behavior. Knowledge of Myers-Briggs personality type, however, can enable individuals to understand, predict, and manage these reactions.

"The Myers-Briggs assessment helped us identify and predict how individuals will react to stress," said Markovich. "By tying the assessment results to the survey data, we were

able to arm them with foreknowledge and self-awareness that enabled them to better handle many of the stress-induced situations that had negatively affected their ability to manage.”

EVIDENCE-BASED LEADERSHIP DEVELOPMENT

Weigand stresses that the entire program—from the collection of presurvey data through the counseling/training and postsurvey steps—was designed as a 360-degree process of identifying challenges and addressing them in a manner that would create a much stronger organization.

“The program is based on Kirkpatrick’s ‘Four Levels of Evaluation,’ in which each level of evaluation serves as a basis for the subsequent level,” he said. “We’re entering the ‘results’ level of evaluation. Ironically, while this is the phase at which you begin to quantify the effects of your labors, very few organizations actually follow their programs through to this level.”

“Our work can be termed ‘evidence-based’ leadership development because we’re generating real-time data about effects of our coaching process,” Weigand continued. The mid-term data that were generated six months into the program were crucial, as they indicated both the “degree to which we’ve accomplished our goals and the adjustments that need to be made along the way.”

Both Weigand and Markovich had earlier pointed to the May 2010 survey as being decisive in informing them about the long-term effectiveness of the intervention program. When the results were in, they showed virtually no drop-off among participants since the six-month survey, further validating the effectiveness of the program—given that no significant changes were made to the program between the 6- and 18-month surveys.

This kind of sustained improvement demonstrates “the importance not only of giving participants the time it takes to implement their learning but also of working consistently with them during that time,” said Weigand. “Too often programs are abandoned before they yield fruit and a tremendous amount of money is wasted.”

He stresses that the fact the program is still showing strong returns after 18 months is informative for any organization planning a similar initiative. “Often success requires that

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participants reorient deeply engrained thinking and alter behaviors that have become habitual over decades. These things don’t change overnight, or after one coaching session.”

As St. Luke’s continues to develop the vitality of its workforce, it is considering instituting a regular 18-month review of the progress of managers on the improvement track that will emphasize individual achievements, in addition to survey scores.

CONCLUSION

As a company that has traditionally led the market within the U.S. healthcare industry, St. Luke’s continues on the path of perpetual improvement by refining its most important asset—its workforce. Utilizing several assessments, including CPP’s Myers-Briggs and CPI 434 instruments, Weigand and Markovich are fully immersed in a program that is well on its way to transforming the St. Luke’s leadership staff into one that is satisfied, engaged, and using the best of its talents to move the company forward. In turn, this has improved the overall level of workforce satisfaction and engagement within the organization.

That transformation, according to Weigand and Markovich, would not be possible without the use of the assessments, which have provided a means to effectively bridge the growth areas identified by the initial survey to psychometrically validated preferences and characteristics. These preferences and characteristics, as identified by the Myers-Briggs, CPI 434, Watson-Glasler, and *Emotional Intelligence Appraisal* assessments, are used to create individualized and measurable development plans that enable managers to address areas of potential growth, hone strengths, and follow a path toward doing their very best work.

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program at St. Luke's with a HAP Award—given out annually to showcase hospital and health system best practices—in the “Workforce” category.

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