

Lab Quality Confab ■ Atlanta, Georgia

**PERFORMANCE COACHING AND MANAGEMENT
OBSERVATIONS IN THE LAB: MASTER THIS PROVEN
WAY TO DEVELOP YOUR LAB'S MANAGERS,
SUPERVISORS, AND LAB STAFF**

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Argent Global Services - Confidential



THE SET UP



Background

Laboratories are strained

- We are in year one of PAMA cuts
- Many labs face issues with a shortage of skilled or experienced personnel
- Laboratories are constantly challenged to do more with less



Staffing Concerns

- The Bureau of Labor Statistics reports that employment of medical laboratory technologists and technicians is expected to grow by 13%, from 330,600 in 2010 to 373,500 in 2020¹
- This translates into about 11,300 laboratory technologist/ technician job openings annually through 2018¹
- Fewer than 5,000 individuals are graduating each year from accredited training programs²

¹ LabTestingMatters, April 4, 2017

² ASCP, June, 2011



Staffing Issues

- We have known for some time that the current workforce is getting older. In 2015 the mean age of laboratory personnel is 44 years¹
- Results show that the projected retirement rate for supervisors is higher than that for staff¹
- Recruiting - competing with jobs outside of the laboratory

¹ ASCP Wage and Vacancy Surveys, 2015

² ASCP Wage and Vacancy Surveys, 2013



Retention

- There are traditional, direct, factors that we think about, e.g., pay, benefits or advancement
- Don't overlook the impact of soft factors such as feedback, letting someone know how they are doing, clear expectations and participating in improvements
- *Employee development such as training, continuing education and mentoring can prove beneficial in retaining staff.¹*

¹ ASCP Wage Summary Report 2015



Supervisors

- Most supervisors and managers started as technologists
- Many supervisors are still “on the bench”; It’s good they are on the floor, but where is their focus
- How do we develop leadership and management skills in laboratory work environments?



Staff Challenges

Key Challenges for the lab:

1. Improving employee satisfaction – retention and growth
2. Developing new/young staff
3. Developing Supervisors and Managers
4. Ensure staff is prepared to take on changes



Solutions

- Labs should be looking for creative ways to address these challenges
- Other industries have utilized a staff development tool known as *Observations and Performance Coaching*
- Developed by Industrial Engineers to complement Operation Improvement and Labor Management initiatives



PERFORMANCE COACHING



*A manager is a title, it does not guarantee success.
Coaching is an action, not a title and actions will result
in successes!* – Catherine Pulsifer

*The goal of coaching is the goal of good management:
to make the most of an organization's valuable
resources.* – Harvard Business Review



Performance Coaching

- Performance Coaching is a formal and consistent way to provide feedback and hands-on training for associates
- It involves Supervisors and Managers observing individual associates during cycles of work, documenting performance and providing feedback
- Performance Coaching is working one-on-one with associates in a structured manner



Observations as an Assessment

- Observations are not new to the laboratory or medical field
- Competency observations or Performance Evaluations:
- Is an assessment that can rely on checklists to rate or confirm an employees competency
- Management observations a little different



Why We Do It

Two primary goals of Management Observation & Performance Coaching

1. Improve productivity, quality and safety on an individual level
2. Ensure associates are properly trained to be successful



Additional Benefits

Additional benefits of Coaching include:

- Improve communication between management and associates
- Improve awareness of low performers and where they need help
- Documents individual training that associates are receiving from management
- Learn and share how good performers work (principles of Best Methods)



How It's Done

- First we Observe
- Then we Coach



Observations tips

- When you begin an observation, always remind the associate of the purpose
- Ask them to work at a normal pace, no need to get nervous or rush
- Stay close enough to observe, but never get in the way. The associate should forget you are there



How It's Done

- Observe an associate, uninterrupted, for at least 30 minutes or for complete work cycles
- Try not to interrupt associate. Wait until the end to provide feedback and coaching
- Only observe one associate at a time




How It's Done

- Utilize a standardized coaching form
- Document observations and provide feedback and coaching at the end of the session
- Focus on constructive feedback and training never disciplinary actions



Sample Observation Form

 Performance Coaching Form		
Associate Name	_____	Date / Shift _____
Associate ID	_____	Function _____
Performed By	_____	Location _____
Primary Purpose	<input type="checkbox"/> Scheduled Coaching <input type="checkbox"/> Performance Based <input type="checkbox"/> Validation	
STATISTICS		
Units	_____	Start Time: _____ End Time: _____
PRODUCTIVITY		
Activity	Strengths	Opportunities
Setup/Organization		
Handling/Processes		
Travel/Motion		
Random		
PROCEDURES		
Pace		
Methods		
Housekeeping		
Quality		
Safety		
Signatures Associate: _____ Observer: _____		
APCF 4/24/2017 v1.0 Methods Only		

Header

Statistics


Productivity

Procedures



Header

- Use the header to capture general information such as employee name, date, function
- Statistics

		Performance Coaching Form	
Associate Name	_____	Date / Shift	_____
Associate ID	_____	Function	_____
Performed By	_____	Location	_____
Primary Purpose	<input type="checkbox"/> Scheduled Coaching <input type="checkbox"/> Performance Based <input type="checkbox"/> Validation		
STATISTICS			
Units	_____	Start Time:	_____
		End Time:	_____



Productivity Section

<i>PRODUCTIVITY</i>		
Activity	Strengths	Opportunities
Setup/Organization		
Handling/Processes		
Travel/Motion		
Random		



Productivity

- This section is related to efficient work and productivity
- Think “Lean”, value added vs non-value added
- Capture coaching points to be shared with the associate
- Use the categories as guidelines
- Document Strengths and Opportunities



Examples

- How is their set up and organization
- Do they have the proper supplies
- Double handling, re-handling
- How well do they plan their activities, e.g., performing maintenance or QC on multiple instruments
- Efficient travel or motion, unnecessary trips
- Batching
- How cluttered is their work area
- How often do they recheck their work



Procedures

- This section is for well-defined expectations related to the job

<i>PROCEDURES</i>
Pace
Methods/SOP
Quality
Safety
Housekeeping



Procedures

- Comments related to how well the associate followed instructions or met standards
- Not just checkboxes but relevant feedback that can help the associate



Coaching

- After the observation is complete, you will coach the associate
- Definition: Coach \kōch\ : one who instructs or trains. A coach is also an expert who trains someone learning or improving a skill, esp. one related to performing



Coaching and Feedback

- Use the completed observation form to coach and motivate the associate
- Review strengths and opportunities, these are key coaching points
- Make recommendations for improvement
- **ALWAYS** compliment the associate on well performed areas



Tips for Success

- Never spy on an associates or conduct the observation from a distance
- Before starting an observation, go back and review the last session with that associate
- Capture feedback during the observation so the form is as complete as possible when the associate is done with the work
- Avoid interruptions during the observation
- Always keep the feedback positive and upbeat



BEST METHODS



Best Methods

- Another outcome of observations is that it can facilitate the development of Best Methods

Best Methods, aka Best Practices:

- *A systematic approach for performing work that results in maximum output with the least waste at the lowest possible cost*



Best Methods

- Best Methods are different than SOPs, they should focus on value-add and efficiencies
- We develop Best Methods by learning from our best performers – *Learn and Share*
- Additionally, Best Methods are about the entire value-stream, e.g., work balancing





COACHING PROGRAM



Scheduling

- All associates should be observed
- Focus on new associates and low performers
- Higher performers will be less frequent
- Up the schedule when there are changes – procedures or automation
- Hold supervisors accountable for coaching sessions



Record Keeping

- Maintain records of the coaching sessions
- File or scan
- Some organizations create a database
- Treat this like training documentation



Performance Goals

- Some labs are holding associates accountable to performance goals
- If you do, incorporate the goals into the coaching process
- Use the sessions to ensure the personnel understand how they are measured and how to be successful



Develop a Plan for Your Lab

- Develop a plan that works well for your lab's goals
- Consider the type of lab, number of staff, level of staff
- Customize a Coaching Form
- Establish the rules and expectations



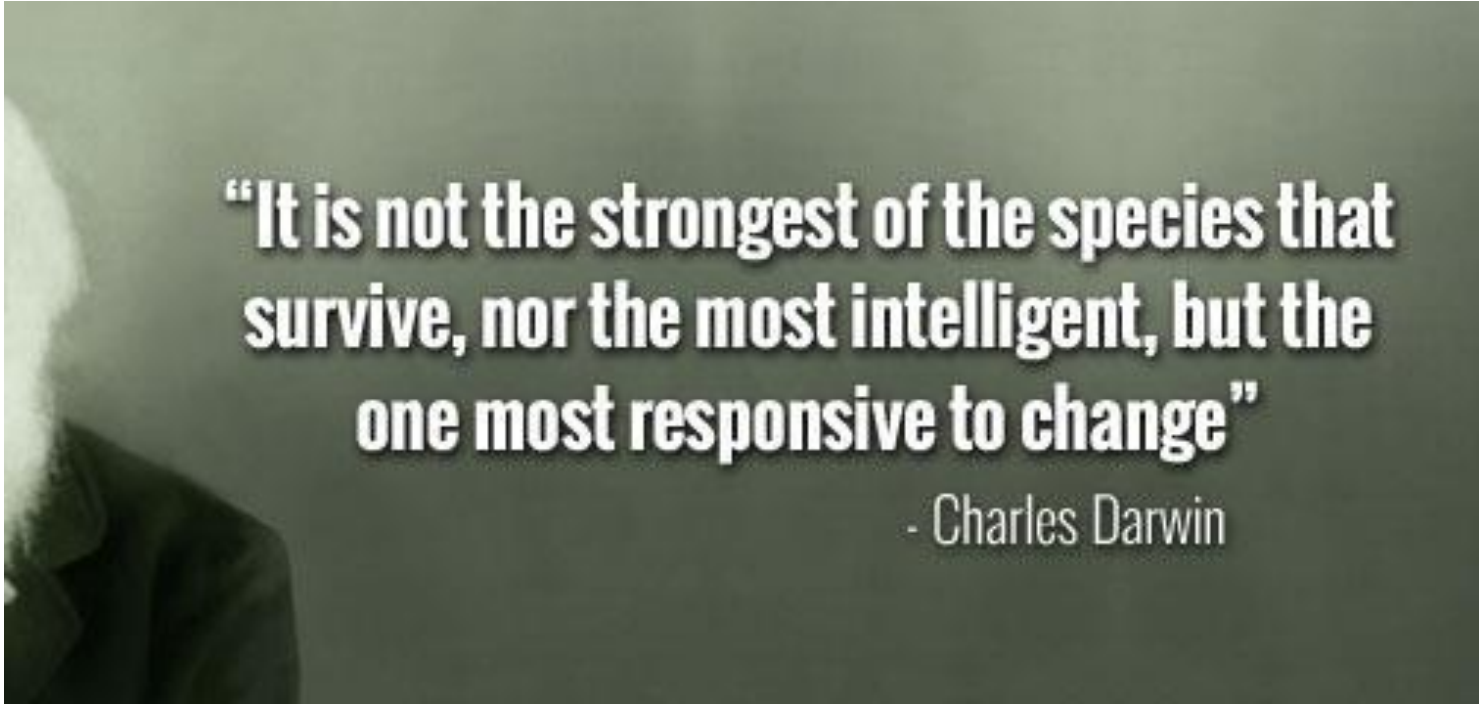

SUMMARY



Summary

- Observations and performance coaching are a tool that will help with both employee and management development
- Help improve employee satisfaction
- Drive efficiencies and productivity in the lab





“It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change”

- Charles Darwin

Thank You For Your Time!





END OF PRESENTATION

