Building and Using Executive Teams

By Ed O'Neil, Principal, O'Neil & Associates

- *"My team was carefully put together from the best folks inside and out of the company, but they seem more focused on building their empire than seeing or valuing the work of our division, much less the organization."*
- *"Leadership meetings are dreadful, nothing but dull reports, mercifully interrupted by the occasional firefighting."*
- *"I'm convinced that there is not a better more congenial group of leaders in the agency, but our time is completely wasted and I'm not sure anyone knows how to get us on track."*

If these laments sound familiar, they are taken directly from my work across the health care spectrum — from hospitals, public insurers, and health care systems. What is most disconcerting is that I often hear similar complaints from both team leaders and members, all of whom are on the same team.

Like the last quote above, most executive teams are made up of people who are accomplished, dedicated, and well meaning, but no one seems to know how to reset to get the best out of them. Executive teams are not very different from other types of teams. To be effective they need clear goals, roles, processes, and active modeling from the leader. Here are some thoughts:

1. Define Their Purpose

The first step is to make the purpose, direction, goals and values of the leadership team as transparent as possible. Whether you call it a charter, charge, or mission statement it should look something like the example below.

Leadership Tips

Leadership Tips is an ongoing series produced by the Center for Health Care Strategies' *Medicaid Leadership Institute* in collaboration with O'Neil & Associates. The series is designed to provide general guidance to help leadership of state agencies and their senior managers develop and refine the skills and expertise necessary to successfully lead their state programs. To view the full series, visit **www.chcs.org/leadership-tips**.

Sample Medicaid Agency Executive Team Charter

"My expectation of our Leadership Team is that we will all be committed to the agency's overall purpose to improve the lives and health of our citizens as effectively and efficiently as possible. To do this, we will collectively assume responsibility for developing and implementing strategies to advance and improve our work to meet this goal. The behaviors that will characterize our team are creativity, honesty, directness, support for one another, development of ourselves and our teams, and professional integrity with how we work. It is the responsibility of each team member to hold themselves and all other members of the team, including the Director, accountable for living these behaviors."

2. Clarify Their Role

There are many ways to describe roles. The key is to get the definition to fit everyone and to have a strong behavioral dimension, for example:

"As members of the Executive Leadership team, we will individually and collectively operate and lead our sections with excellence and openness, develop and maintain an enterprise-wide perspective, understand and value the contributions of each area, take responsibility for helping other team members develop, build our collective understanding of the external environment in which we compete, contribute to the ongoing monitoring of our work internally with customers and collaborators, and hold ourselves and the rest of the team accountable to our list of shared values."

3. Identify Key Processes

There are many important processes that good teams exhibit, but three are key: decision making, communication, and conflict management. If these three can be owned and managed by every team member, then most other things will take care of themselves. First, make sure that the decision-making process is clear and reflects the values you want to characterize your team. If you desire a lot of engagement within the team and want them to take on more challenging tasks, but you are still swooping in to make all of the decisions, or publicly second-guessing decisions they do make, then they are not likely to be as independent as you want.

The two rules are: One, be clear with what the decision-making process is and be certain it reflects the outcomes you want. Two, have everyone discuss and own the communication protocol. This should start with an email [manifesto](#) that everyone agrees to, but includes the full range of communications expectations—from transparency, to style, to frequency. Finally, it is essential that executive teams normalize conflict. The best way to do that is to have a discussion about the "rules of engagement," such as no personal attacks, focus on the general purpose, politeness, etc. These should change and grow with the team.

4. Model What You Want

If you want staff to be more supportive of each other, then you need to be supportive of them by encouraging them to create a development plan and dedicating some of your time to making it succeed. If you want to build a more transparent relationship with others, then you need to gradually build more openness and honesty into your communications. When you cannot be as open as you would like, let them know as much as you can as to why this is the case. And do not forget self-awareness — it is always key to successful teams. Be open about what you know about yourself, and ask others to share how they see you. Though not easy at first, this is a strength of all great teams. Deciding and expressing what values you want in the team will create the culture you desire. For example, steps might be to:

- Create a short list of values you want the team to reestablish or start anew – four to six is a good place to start;
- Establish how you express these values through your behavior and allocation of time, focus, and energy;
- Give yourself honest feedback on the step above, i.e., do you really do this or is it more an aspiration?; and
- Establish a plan to practice one value by changing or emphasizing a behavior, for example: "These are the three things I will do this month with the leadership team to be more transparent."

5. Structure What You Want

Your behavior is important to changing team culture, but so is the material reality that surrounds them. If you want them to focus on broad strategic issues, then you need to get them out of the day-to-day and give them a time and place to do that sort of work. They might not know how to do this, so you might need some help from an outside facilitator to teach them how to think and engage at a strategic, rather than operational, level. You might want them to be more creative, so you may consider a workshop with someone that can help them practice responding to problems with more creativity. But simpler things also help. If accountability is a problem, are you using one of the many online project management tools to share commitments, deadlines, and progress? Is a staff person assigned to keep it current? Is a part of each team member's annual review tied to how well they have expressed the new team values and behaviors through their work?

6. Practice What You Want

Aristotle said that if you want to be a better archer, you should probably shoot some arrows. So, practicing these dimensions of team work in regular executive team meetings, retreats, and having the members practice within their own teams will move it forward and make it better. I have also developed a longer list of practices for alignment, roles, and professional growth that you might try.

7. Create a Symbol for Success

One of the best leaders I have ever worked with had an executive team that did not support the whole enterprise as much as was needed. One weekend, he was away in the North Carolina hills and came home with some very small, four-legged stools handcrafted and about the size of your fist. He left them on the corner of our desks on Monday morning. At the next Dean's Council, he shared that in his mind we were like those stools: four legs – education, clinical care, research and service – and that when we did not work together, the stool got a little off balance and did not work as well. Simple, I know, but it sat there on my desk as a constant reminder to raise my sights and look across the organization, not just my department. It worked. And 35 years later I still remember, and I still have the stool.

Team Assessment Checklist

✓ Are the broad vision and purpose clear?
✓ Does it connect to a broader strategy?
✓ Do we have the right mix of skills?
✓ Do we have the right mix of perspectives?
✓ Do we balance task and process?
✓ Do we have a shared understanding about decisions?
✓ Have we performed?
✓ Do I look forward to going to the meetings?
✓ How safe do I feel in the meetings?

About Ed O'Neil

Ed O'Neil, PhD, MPA, is the owner of O'Neil & Associates, a management consulting and leadership development firm focused on change and renewal in the health care system. He was previously professor in the Departments of Family and Community Medicine, Preventive and Restorative Dental Sciences, and Social and Behavioral Sciences (School of Nursing) at the University of California, San Francisco (UCSF). At UCSF, he served as the director of the Center for the Health Professions, a research, advocacy, and training institute that he created in 1992. His work over the past three decades has focused on changing the US health care system through improved policy and leadership. To learn more, visit **www.oneil-and-associates.com**; contact Ed O'Neil at herringoneil@gmail.com.

About the Medicaid Leadership Institute

The *Medicaid Leadership Institute*, an initiative of the Robert Wood Johnson Foundation led by the Center for Health Care Strategies, helps Medicaid directors develop the skills and expertise necessary to successfully lead their state programs in an ever-changing policy environment. In addition, CHCS *Medicaid Academies* provide policy and leadership training for senior Medicaid staff as well as colleagues across partnering state and county agencies. Ed O'Neil has advised numerous MLI Fellows and Medicaid senior managers over the past decade. To learn more, visit **www.chcs.org/medicaid-leaders.**

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