

“Making a Difference”

Working effectively as an Interim

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NHS IMAS Webinar
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Quote

- ▶ *“It is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is most adaptable to change.”*
- ▶ *Not Charles Darwin*
- ▶ *Leon C. Megginson, Professor of Management and Marketing at Louisiana State University at Baton Rouge*

Background - Why I became an Interim / Consultant

- ▶ Successful career in private sector and subsequently NHS
- ▶ Worked at Executive and Chief Executive level for a number of years
- ▶ Felt the need to do something different
- ▶ Lived in NZ for four years - worked for St John
- ▶ Culminated in response to Christchurch earthquake
- ▶ Returned to UK - NHS in state of reorganisation
- ▶ Decided to work as a consultant / interim - before return
- ▶ Contacted previous colleagues and started first role two months after returning

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- ▶ Wanted to make a difference for people
- ▶ Noted the “skills” that I had developed
- ▶ Around improvement - making things happen
- ▶ Planning - importance of planning and recognising that plans change
- ▶ “Hope is not a strategy”
- ▶ Coaching - working with and developing people
- ▶ Focused on results - like to look back and see where I’ve been

Background - Areas I've worked in

- ▶ NHS England
- ▶ Department of Health
- ▶ Acute Trusts
- ▶ Ambulance Services
- ▶ CSU
- ▶ Networks
- ▶ Charity

What type of role is it?

- ▶ Interim Management Role - undertaking a role that sits within an organisations structure. Usually has reports and a reporting line.
- ▶ Programme / Project Role - Work on a defined project to deliver a specific result
- ▶ Consultancy - Providing advice on a specific topic, producing a bespoke report
- ▶ It is important to understand exactly what type of role you are taking on and how you can describe this

How do you meet the brief?

- ▶ If you are an independent interim then you must be able to meet the brief and hit the ground running
- ▶ Whilst skills are transferable you must be comfortable that your skill set and knowledge will enable you to deliver quickly for the client and gain confidence of and credibility with new colleagues
- ▶ If you are an NHS candidate then it may be a developmental role and it is understood that you may need to learn along the journey. However there is still an expectation of delivery
- ▶ Whoever we are we should be:
 - ▶ Capable of meeting the objectives
 - ▶ Learning and developing during the assignment
 - ▶ Meeting new people and making new contacts !

Challenge 1 - The interview / meeting

- ▶ Is this an interview or a meeting ?
- ▶ Remember to prepare fully for either
- ▶ The client will be less prepared than you and may not know fully what the requirement is - particularly if this is not a specific role within the organisation
- ▶ Don't expect a JD and Person Spec !
- ▶ Who really is the client ?
- ▶ What is the exit plan ?

My First Interview

- ▶ CEO called me and asked if I'd support an initiative within the Trust
- ▶ Meeting with GM and Med Dir of division
- ▶ Clear that they didn't really understand why I was needed or what I would add!
- ▶ Secret Weapons
 - ▶ Honesty
 - ▶ Scope on a Rope
- ▶ End Result :
 - ▶ Assignment went really well
 - ▶ GM and Med Dir asked me to do further work
 - ▶ Further repeat business

Scope on a Rope

Vision of success

- What are you trying to achieve?
- What will good look like?
- How will it be different from what you have now?

ALWAYS ASK WHY

Context

- Why now?
- What are the drivers?
- How strong is the driver?

ALWAYS ASK WHY

Constraints

- What's the budget?
- Who's available – what resource have you got?
- What's the real time frame?
- What's the risk / regulatory status?
- What's in / out of scope?

ALWAYS ASK WHY

Politics

- Is it supported by up there?
- Who is against it?
- What history is there?
- Who are most affected by the outcome?

ALWAYS ASK WHY

WHAT ARE YOU BEING ASKED TO DO?

Challenge 2 - Getting Started

- ▶ “Begin with the end in mind” - Stephen Covey
- ▶ Important to understand where you are going and develop a plan to get there
- ▶ This is YOUR plan - not a project plan
- ▶ Develop it how it works for you
- ▶ Make sure it is written down
- ▶ Commit to it
- ▶ Share outline with the key client
- ▶ Be flexible and adapt along the way
- ▶ Don't compromise on the end goal without agreement


Making a Difference - Track Progress

- ▶ Make sure it's your day, your week, your month, and your year !
- ▶ Why is it important
 - ▶ To show the client what you have done and “where you have been”
 - ▶ To show yourself the progress you have made
 - ▶ To make sure you are focused for tomorrow / next week
 - ▶ No surprises
 - ▶ Helps identify and remove blocks

Tracking Progress

- ▶ My Method
 - ▶ 15 minute daily review slot (for me) - today / tomorrow
 - ▶ Weekly written update
 - ▶ Progress this week
 - ▶ Plan for next week
 - ▶ Agenda for meeting - including “blockers”
 - ▶ Set weekly/fortnightly meetings with the key client
 - ▶ Key milestone review
 - ▶ Quarterly / six monthly review
 - ▶ End of assignment closure

Example Progress Report



CLIENT LOGO

Progress Report W/E 24/02/2023

This week

Role 1

- Project Board cancelled due to clash with Trust committees
- Improvement Manager and Leads contacted and connected to team
- Additional recruitment numbers confirmed and costed
- Business Case prepared and issued to relevant Executive

Role 2

- Initial scoping meeting held with responsible Director

Next Steps

Role 1

- Ensure transformation is embedded in the core team and that this becomes the business plan
- Meeting with new improvement leads to run through project plan
- Reschedule Project Board meeting – provide interim update

Role 2

- Meet with responsible director to further develop understanding
- Scheduling meetings with key people
- Visit sites to understand roles and dynamics

Weekly Agenda xxx / Andrew 1st March 2023

- Update on progress
- Understand requirements for next three months
- Discuss potential blocks and challenges

Andrew Cratchley
February 24th 2023

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Challenge 3 - Managing Through Influence

- ▶ Most roles don't come with positional power - Can use the proxy position of your client
- ▶ Not the best tool for getting the best out of people anyway
- ▶ Understand you are a guest in their organisation
- ▶ Build rapport and connections - find common ground
- ▶ Be visible and communicate, be inquisitive
- ▶ Through this build Trust
- ▶ Involve others in the key decisions
- ▶ Don't burden others - credit them (especially to seniors!)
- ▶ Recognise and celebrate successes with the internal teams

Influence

- ▶ I never assume I know more than the people around me
- ▶ Have to get to an understanding of the organisation and where influence sits quickly - you only have a short time
- ▶ Use networks - who knows everything and everyone
- ▶ Example of Network role
 - ▶ Took role by default
 - ▶ Number of strong organisations / characters and egos!
 - ▶ Decided I didn't need to be "in charge" of everything
 - ▶ What happened
 - ▶ Joint chairs of work-streams
 - ▶ Buy in
 - ▶ Delivery on key projects
 - ▶ Credited in papers (by product!)

Challenge 4 - Managing Multiple Assignments

- ▶ This is sometimes everyone's nirvana - but can be a downfall
- ▶ Need to ensure YOU understand what is required and how you can manage it
- ▶ Make sure this position is understood by both clients and people you are working with
- ▶ There will be times when you need to take a call / hold a meeting with client 2 whilst working for Client 1 !
- ▶ Give each full attention and commitment
- ▶ Make sure you can make it work - this isn't the clients responsibility
- ▶ Keep a clear diary of time spent with each client and on each assignment
- ▶ Don't over commit
- ▶ Maintain some boundaries

Multiple Assignments

- ▶ Example of DH / Acute Trust
- ▶ Initial thoughts
 - ▶ Monday / Thursday / Friday - acute
 - ▶ Tuesday / Wednesday - London DH
- ▶ Everyone else's diary didn't fit with mine!
- ▶ Discussed with key clients
- ▶ Open with people around me - days before teams - didn't hide to do phone calls or check emails!
- ▶ People were accommodating
- ▶ Kept all informed of progress - worked well particularly when one assignment needed specific focus over a week for example

Challenge 5

Keeping momentum

- ▶ This is when the plan comes into it's own
- ▶ Focus on the delivery of our task(s)
- ▶ Others will have a myriad of things going on - we need to recognise that but not be distracted by it
- ▶ Hold people to account for agreed deliverables and remind them of reporting timetables
- ▶ If you are stuck - work out what is actually stopping you - then deal with it
 - ▶ More often than not frustration leads to procrastination
- ▶ Refer to key client and explain without blaming others
- ▶ Where else can you can support from and how - good example strong relationships with PA's will ensure you get time with people

You're not there to do everything - set boundaries!

- ▶ Easy to get sucked into the day to day challenges and dramas of an organisation that is actually nothing to do with us
- ▶ Remind yourself and others of your role - you can listen / coach / support / empathise without being committed - English breakfast - pig committed chicken involved
- ▶ If you find yourself at a loose end - don't worry - focus on your project/piece of work - what needs to change - what can you do differently ?
- ▶ Additional requests come at a cost - make sure it's not yours ! - Handle each appropriately and sensitively
- ▶ You can say no - benefits of working independently include managing your own time

Challenge 6 - Dealing with difficult people

- ▶ Not everyone will be happy to see you
- ▶ Always look to understand - where are peoples egos sitting
- ▶ Be compassionate toward them
- ▶ Often you will find others have difficulty with them too
- ▶ If they become obstructive - raise it with them in a constructive and factual way
- ▶ Inform the client on an FYI basis and explain how you are handing it - get their view and buy in to your approach
- ▶ Continued failure to respond - escalate !

Challenge 7 - Leaving

- ▶ Stick to your exit plan
- ▶ Follow the plan and you will leave on good terms
- ▶ Walk away ! (CAST song on radio)
- ▶ If you are offered further work make sure that it meets your needs as well as the clients
- ▶ How will this be different, how can you add value and what will it give you?
- ▶ Approach this as an entirely new assignment
- ▶ If you are offered a full time job
 - ▶ Is this what you want
 - ▶ Is this the organisation you would choose
 - ▶ How will life be different
- ▶ Don't be afraid to ask for a break

One of my favourite roles

- ▶ Asked by acute CEO to manage the charity
- ▶ Big charity -
- ▶ Lost it's way - good Trust, good people, right ethos
- ▶ Completely disconnected from the Trust
- ▶ Charity event - looking at a significant loss - huge costs associated with it - no real income streams
- ▶ Worked hard behind the scenes - using knowledge, influence and visibility to bring the Charity back to the organisation
- ▶ The event was a success - raised over £100K overall managed to return a surplus - largely due to Trust staff

Challenge 8 - Finding your next role

- ▶ Do you need a break?
- ▶ Reflect
 - ▶ What have you added to your kit bag from this role?
 - ▶ What have been the real successes
 - ▶ What have been the real challenges
- ▶ What does your next role look like?
 - ▶ Location
 - ▶ Type of role
 - ▶ Organisation
 - ▶ Working with ?
- ▶ Maintain your contacts during this assignment - they will know when you will be ready again
- ▶ Don't panic a role will come along - if you have completed work well before

Turning Roles Down

- ▶ If a role isn't right it isn't right
- ▶ There are other roles in other areas that may be more suitable

Summary

- ▶ Know what's expected
 - ▶ Set out plan
 - ▶ Get on and do it - deliver
 - ▶ Check and recheck - keep delivering
 - ▶ Keep updating along the way (no surprises)
 - ▶ When the time is right - move on !
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- ▶ Remember - “this is not a part time job” - it is hard work and requires focus and attention. Managing through influence is tough - schedule in breaks