Challenges and Solutions to New Manager Onboarding

Hospital Pharmacy
2017, Vol. 52(10) 712–714
© The Author(s) 2017
Reprints and permissions:
sagepub.com/journalsPermissions.nav
DOI: 10.1177/0018578717721080
journals.sagepub.com/home/hpx

Daniel P. O'Neil¹, Lindsey Amerine², and Carol Woodward¹

Abstract

This article outlines challenges and solutions to new managers onboarding within a department of pharmacy.

Keywords

management, onboarding, new practitioner

The first 3 months of a management role are often considered to be the most crucial, and an entry-level hospital pharmacy management role is no different. Most entry-level managers come into the position with multiple years of clinical experience and very little administrative experience. Health-System Pharmacy Administration residencies are intended to focus future leaders in the clinical and administrative aspects of pharmacy; however, it can still be an intimidating and overwhelming experience once out of residency in a new manager position. A well-thought out action plan can ease the anxiety level of the new manager and ensure they are set up to be fully successful in the new position.

The 100-Day Action Plan

Action plans, specifically 100-day action plans, have been described previously; however, literature focuses on general management rather than pharmacy or health care. Although certain practices have been found anecdotally helpful, there is little literature within the pharmacy community regarding new manager onboarding within the first 100 days. Components of a 100-day action plan should be multifocal to achieve the ultimate goals of allowing the manager to feel comfortable in their role, exposing the new manager to the human and operational dynamics of the department and organization, and acceptance of the new manager by the various teams important to the department. The 100-day action plan, while individualized, should include key objectives, an outline of a schedule, a communication plan for those involved in your work unit, and a plan to understand the financial, operational, and personal aspects of the department or organization (for example, see Figure 1).

Circles of Influence

In his book *The 7 Habits of Highly Effective People*, Stephen Covey explains that proactive people focus efforts on their

Circles of Influence.¹ Developing relationships with individuals within your circles of influence should be a key objective within the first 100 days. Your circle of influence, at least in the beginning, will be estimated and may change, but should include individuals within and outside of the managed work unit that have a vested interest in the area.

Supervisor

Initial one-on-one meetings with the direct supervisor should be one of the first steps toward developing the 100-day action plan. It is important to note that the direct supervisor may already have a 100-day action plan well prepared, while others will expect the new manager to develop it. During initial meetings with the direct supervisor, it is imperative to assess 4 things: the situation of the department, the expectations of the department, the types and locations of resources available to you, and the style of communication expected between the new manager and the direct supervisor. Understanding the department's specific areas of need, as each department is unique, and the supervisor's expectations are key to being successful within the first 100 days.

Direct Reports

Meetings with the new direct reports build relationships with the staff and understand the history and dynamics of the team. These meetings can occur as group and one-on-one

¹West Virginia University Medicine, Morgantown, USA

²University of North Carolina Medical Center, Chapel Hill, USA

Corresponding Author:

Daniel P. O'Neil, Assistant Director of Pharmacy, Department of Pharmacy, West Virginia University Medicine, Morgantown, WV 26505, USA.

Email: oneild@wvumedicine.org

Key Objectives	Schedule	Circles of Influence	Finance	Future Planning
☐ Meet with each employee ☐ Communicate expectations to staff ☐ Send staffing schedule to employees ☐ Train or shadow each position ☐ Detail the productivity and financials of cost center(s) ☐ Establish relationships with circles of influence ☐ Begin to design future growth and innovations	☐ Set meetings with direct supervisor ☐ Establish monthly 1:1's with each employee ☐ Establish weekly huddles with core groups ☐ Begin monthly all-staff meetings ☐ Meet at least once with circles of influence	<div>Pharmacy</div> ☐ Direct supervisor ☐ Director ☐ Leadership team <div>Administration</div> ☐ Vice president of ancillary/pharmacy ☐ Chief Medical Officer (CMO) <div>Physicians</div> ☐ Division chair of each clinical department ☐ Integral physician or pharmacy supporter <div>Nursing</div> ☐ Nurse manager of each unit <div>Ancillary</div> ☐ Respiratory ☐ Information technology (IT) ☐ Facilities management or Design & Construction	☐ Request financials for cost center(s) ☐ Understand inventory reporting ☐ Obtain existing dashboard or metrics ☐ Request FTE approvals vs. openings	☐ TBD

Figure 1. New Pharmacy Manager 100-Day Action Plan Checklist Example.

sessions. Initially, one-on-one meetings with direct reports may be more formal with scripted questions. Building a genuine relationship with the individuals on the team is one of the main objectives of the first 100 days. One should understand their background, what they want to change and what they do not want to change, their biggest fear or apprehension, and advice they have for you moving forward. Depending on the size of the new manager's team, one-on-one meetings should generally begin to occur within the first 2 weeks, but may be spread out over the next 4 weeks. One-on-ones will ideally continue monthly thereafter, but at least quarterly with each employee. Team meetings are also an avenue to broadly communicate expectations and learn the culture of the area.

Intradepartmental

Communication between departments or work units is essential to a high-functioning organization. Time, whether monthly or an initial one-on-one, should be set up between those who have similar goals or management areas. Some organizations may have pathways set up for directors or vice presidents of other departments to give an overview of their services to new managers, while others may leave it up to the new manager to schedule. In either situation, 30- to 60-minute meetings with leaders of departments outside of pharmacy build a foundational relationship that can further develop long-term.

Learning Operations

Staffing or shadowing should be completed within the first 100 days. The new manager should first attempt to grasp the various types of jobs within the work unit to effectively plan out job shadowing or training. An entry-level manager's goal is to feel comfortable staffing their areas of oversight as needed or required. All department-required training and competencies for individuals to carry out staffing should be followed to learn the process and to earn the right to staff. As a training or shadowing calendar is prepared, share it with the direct supervisor and the staff within the department to ensure the expectations of time in each area are appropriate. For a higher level management position, shadowing or departmental rounding will be the main focus during the first 100 days. While it may not be necessary to understand the details within the operations, it is beneficial to understand the responsibilities within the areas and how they work together. A thorough understanding of the organizational structure and culture is also a goal within the first 100 days regardless of the management position. This type of learning may best be learned through the relationships developed with the identified Circles of Influence.

Future Planning and Direction

Within the individual and team meetings, staffing, and shadowing experiences, the new leader will make notes of items that will be small wins, questions to look into further, and larger projects to be completed. The small win items are tasks that can be accomplished with low effort but have high impact. These can be completed in the first 100 days to gain the trust and credibility of staff and the supervisor. Larger project ideas help the leader begin to plan for the future once they understand the current state. Going into a new role with a set plan and agenda for the future will likely be met with resistance as the trust of the direct reports has not been built, so it is best to first understand the area's needs before building the strategic direction.

Measurements of Success

With few agreed upon outcomes of success for managers within the first 100 days, measurements should be based on discussions with direct reports, supervisors, and colleagues. Goals for the first few months should be clear, concise, simple, and realistic. They should be thoroughly vetted between the new manager and their supervisor to ensure the desired outcomes are achieved. At minimum and above all else, the goal for the new manager should be to feel comfortable in the new role.

Conclusion

The 100-day action plan acts as a guide for individuals in a new leadership position and is tailored to each institution and type of position. The structure within the first 100 days will assist the new manager with getting to know the culture and needs of their areas to set up for a successful transition into the new role.

Authors' Note

This paper was read and approved by all authors.

Declaration of Conflicting Interests

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The author(s) received no financial support for the research, authorship, and/or publication of this article.

Reference

1. Covey SR. *The 7 Habits of Highly Effective People*. New York, NY: Free Press; 1989.