
Leadership for Physician Executives

April 8-13, 2018

Orientation Materials



HARVARD
MEDICAL SCHOOL

Global and Continuing Education

**THE
LEVINSON
INSTITUTE**

WELCOME!

To: Leadership for Physician Executives
From: Kathy Kozlowski
Date: January 2018

On behalf of Dr. Kraines and the Levinson Institute staff, I would like to welcome you to our April 8-13, 2018, **Leadership for Physician Executives** seminar.

Our seminars have been designed to provide you with an intimate environment to reflect on new ideas and old practices, to meet new people, and to consider the nature of your relationships at work. Through our more than 40 years of experience and feedback from participants, we are sure that what we do will make a great week for you.

Like any seminar, however, there are a lot of moving pieces, and planning is required between the triad of the participant, the Institute and the hotel that is our base. In order for all to go as intended, we need you to review this entire packet to understand your accountabilities in relationship to the whole. We have included a timeline so that you can work backwards from April 8 and make the appropriate notations on your electronic calendars about what is due by when.



This electronic packet is designed to give you all of the information you will need so that when you arrive you are confident that you are ready for the week. Please read the entire packet. If you have an assistant who helps you with logistics, please make sure that he or she has the entire packet as well. **Please print it out so that you have it with you. It may be helpful for taxis, etc.**

Enclosed you will find:

1. A fact sheet
2. A timeline
3. The week's schedule
4. Required case work

Please note that your cases will be reviewed by Cynsie Kraines. Once your case is received, all further case communications will be through her. She will also be on site during the seminar week.

5. Your individual interview

(continued)

6. Hotel information
7. Transportation information
8. An article by Dr. Harry Levinson
9. A sample case and sample organizational chart

The next page in this document is an important fact sheet. Please make sure you read it and then feel free to call our seminar staff at any time so that they can answer your questions.

We are looking forward to your week with us!

Contacts:

Kathy Kozlowski
Seminar Coordinator
(800) 290-5735 or (603) 532-4700
kkozlowski@levinsonandco.com

Cynsie Kraines
COO and Senior Vice President, Leadership Development
(800) 290-5735 or (617) 947-8391
ckraines@levinsonandco.com

FACT SHEET

WHERE AM I STAYING? The Double Tree Bedford Glen Hotel, 44 Middlesex Turnpike, Bedford, MA and the phone is (781) 275-5500. Levinson staff members will be making all of the hotel reservations. Please communicate with us at (800) 290-5735 or (603) 532-4700 regarding special needs, extra nights, etc. See page 10 of this packet for more about the hotel.

The hotel's URL is www.bostonbedfordglen.doubletree.com.

WHERE DO I FLY INTO? You can fly into either Boston's Logan International (BOS) or the Manchester-Boston Regional Airport (MHT). On average, both airports are about 40 minutes from the hotel. Please make your flight arrangements so that you are checked in before the reception and dinner begin at 6:15 p.m. On Friday, the seminar ends by 11:30 a.m. If you make reservations to leave before 1:30 p.m. on Friday, you will miss important material around the seminar's completion.

HOW DO I GET TO THE HOTEL? From Logan, there is a car service we have used for many years, Coach Transportation. From Manchester, Flight Line is the less expensive car service. Recently, we have found many seminar participants are now using Uber or Lyft from either airport. The hotel website gives the best directions for you to have on hand for a cab driver or if you are driving. See pages 10 and 11 for more about transportation including contact information.

WHAT AM I FINANCIALLY RESPONSIBLE FOR? Transportation is your only extra expense for the entire seminar with the exception of anything that you charge to your room. All lodging, meals, tips, course materials, and instruction are included into the seminar fee. Please note that you are responsible for paying for any nights beyond Sunday through Thursday.

WHAT DO I WEAR? The week is casual. Jeans are fine; however, if you are more comfortable in business casual, that is fine, too. No evening wear is required. Bring a warm sweater as the meeting rooms can sometimes be on the cool side at any time of the year.

Once you are in transit on Sunday, please let Cynsie Kraines know if you are having any problems with arriving for the start of the seminar. Cynsie's cell phone number is (617) 947-8391.

TIMELINE

- Today** Read this document thoroughly now and return your supplemental form. Make your airline reservations, etc.
- March 16** E-mail your written, "live," case study (as a Microsoft Word document) and an accompanying organizational chart (as it pertains to your position and your case) to Kathy Kozlowski at kkozlowski@levinsonandco.com.
- April 8** Hotel check-in time is 3:00 p.m. The hotel staff will try to accommodate you if you should arrive earlier. The reception and dinner begin at 6:15 p.m. (Dress is casual.)
- Last-minute questions? Call Cynsie Kraines at (617) 947-8391.



SCHEDULE OF THE WEEK

A tentative schedule grid for the week is on the next page. Your week will be comprised of morning interactive lectures and lots of discussion at your tables.


Afternoons will be a combination of lectures, small-group case work, individual interviews with your faculty small-group leader, and free time.

Where these activities fall depends on the numbers enrolled. Your actual schedule and roadmap for the week is prepared just before the seminar begins. As you can see, the case work is a predominant feature of the week, so spending the right amount of time and thought on your case is important. Please see page 8 of this packet for more information about your case work and page 9 for more about individual time with your faculty leader.

On Wednesday evening, you will be free after the last small group. Usually this is a 6 p.m. finish. We will be working with you earlier in the week to understand what you would like to do. People might go to a game of one of Boston's great teams. So, depending on the season and whether your sport is baseball, basketball, or hockey, we may be able to get tickets. The Boston Duck Tours, the Museum of Fine Arts, and great restaurants are draws for Boston. Also, the Boston Marathon is on April 16, so the Back Bay section of Boston will be especially festive and lively. Locally, around the hotel, there is a large mall and a huge Barnes & Noble.

SMALL-GROUP CASE STUDIES

Each participant brings a case study from his or her organization. Each 90-minute small-group session is devoted to one case. Through the utilization of a problem-solving model and the art of open-ended questions, each case will be explored for underlying issues and the principles of the week applied for a deeper understanding of the problem at hand. Your cases are treated in extreme confidence and at the end of your small-group-case presentation, all copies are returned to you.



Your case should be about an **interpersonal** work-related issue. If you believe that it is a structural or process issue that has set you up to have an interpersonal issue, then please look for another situation. This seminar focuses on what makes people tick, and solving a process or structural issue is covered in our other seminar.

Bringing a real problem that you are having that is unresolved is the key to a good case. If between the time you write it and the seminar begins the problem is solved, you must write a new case. Work issues cause a lot of pain and in following that pain we can find root causes that will also allow you to find enduring solutions. So this part of the week is very much about getting your “real” work done. The discipline of getting all of the known data described and identifying what data is missing is a critical skill in leadership roles. Jumping to conclusions and solutions and being reactive are not traits of the best leaders.

Your case should have the following elements and be tightly written in one page with a second page showing the organizational structure involved in the case.

1. A brief description of the organization: geographic scope, products/services, size by people and revenue.
2. Your role, who your manager is and the roles of the people involved in the issue. (Definitions to use: colleague is someone who has the same manager as you. A peer is on the same line of the organization, but he or she has a different manager than you.)
3. Description of the problem and the business impact of the ongoing issue. What have you already tried toward problem resolution? What has had little or no impact? This is a very important part of the case presentation. If the group understands what you have already done then there is no time wasted. Instead, the focus can be on new approaches based on the week's principles.

You will be paired up with someone in your small group who will be called your “helper.” He or she will utilize the tools described above to elicit more detailed information that will help you and the rest of the group understand the issues more deeply. The written case is viewed as a roadmap or guide without all of the details. **A sample case is included at the end of this packet.**

YOUR INDIVIDUAL INTERVIEW

Each participant has a one-hour session with his or her small-group leader. This is a confidential coaching session and the content is up to you. It could be more about your case, another work-related case, home-work life balance, or career issues. Participants have long found the one-on-one sessions to be among the most productive and rewarding aspects of Leadership for Physician Executives.

You will not receive any written report at the end of your coaching session. This is a totally verbal feedback session in which you are welcome to take notes.

HOTEL INFORMATION



The Double Tree Bedford Glen Hotel, www.bostonbedfordglen.doubletree.com, has been our seminar hotel for 25 years. Through three ownerships and two major refurbishing efforts, we have chosen to keep our people under this roof.

The hotel staff specializes in conferences. They know how to make you and other participants feel at home so that you can focus on the work of the week.

There are outdoor patios; an indoor swimming pool; a small, but efficient, gym; tennis courts; and food that is way above average.

Each guest room has internet access, a flat-screen TV, and an ergonomic chair for sitting at the desk.

Directions for getting to the hotel can be found below and we strongly suggest that you print these out and have them with you if you decide to take a cab from the airport. Boston area cab drivers may not be familiar with the area north of the city. (One key marker for them is to say that it is on Middlesex Turnpike, the same road as the Burlington Mall.) The hotel explains in great detail how to navigate to its doors.

From the hotel's website:

From Logan International Airport: Go through the Sumner Tunnel and take I-93 North. I-93 North to exit 37B (I-95 South/ Route 128 South). Follow I-95/Route 128 South to exit 32B (Middlesex Turnpike). Turn right off of the ramp onto Middlesex Turnpike and follow straight for 2.7 miles passing the Burlington Mall on the right. The hotel will be on the left-hand side across the street from the Hampton Inn.

From Manchester, NH Airport: Make a right out of the main entrance on to Brown Ave. Follow for approx. $\frac{3}{4}$ of a mile and take Route 293 North. Take 293 North to the Everett Turnpike. Continue onto the Everett Turnpike Southbound and eventually it will turn into Route 3 South. Follow Route 3 South and take exit 26 (Route 62 exit, Bedford, Burlington). Turn left at the bottom of the ramp onto Burlington Road (Route 62). At the third traffic light take a left onto Middlesex Turnpike. The hotel will be in 0.8 miles on the left-hand side across the street from the Hampton Inn.

OTHER TRANSPORTATION INFORMATION

As we indicated on the fact sheet on page 4, Coach Transportation is a good way to get to the hotel from Logan International Airport (BOS), and Coach Transportation takes credit cards. Coach Transportation's phone numbers are (877) 664-6967 or (781) 229-7979 and its e-mail address is thecoachtransportation@yahoo.com.

We have found that cabs from Logan can cost more than Coach Transportation (not including the tip). Please be aware that not all cabs from Logan accept credit cards; however, the dispatcher at the curb can get you one that does.

The Manchester-Boston Regional Airport (MHT) airport is a great alternative to Logan if you can get a direct flight there. It is small enough to easily navigate, which makes it a much more user-friendly environment than Logan.

From the Manchester, NH, airport, Coach Transportation is significantly more expensive than Flight Line. Therefore, we recommend that you use Flight Line if you are going to that airport. Flight Line can be reached at (800) 245-2525 or info@flightlineinc.com.

During the week, we will ask you to fill out a transportation sheet letting us know your departure time on Friday, your preferences for the amount of time at the airport prior to your flight, whether you want to ride alone so you can catch up on work, etc. The on-site coordinator will attempt to group you into cars from Coach Transportation so that their fixed fee can be shared among a number of passengers.

If you are taking the train from where you live, there are no stops close to the hotel. Cabs from North Station or South Station should be taken to the hotel. If you are public-transportation savvy and don't have a huge amount of luggage, then you can continue on the T (Boston's public transportation system) to the Red Line Alewife Station (which is the closest to the hotel) and take a cab from there.

Check out www.bostonbedfordglen.doubletree.com for driving directions from all points.



Leadership: The Critical Difference in Business Management

An interview with Harry Levinson (1987)*



Dr. Harry Levinson is clinical professor of psychology in the department of psychiatry, Harvard Medical School, and president of The Levinson Institute, a management consulting firm which also publishes a widely circulated management letter. He holds a Certificate from The Menninger Foundation Clinical Psychology Training Program and a Ph.D. from the University of Kansas.

Dr. Levinson played a key role in the dramatic and widely acclaimed reformation of the Kansas state hospital system. He also created and directed the division of industrial mental health at The Menninger Foundation. He has been visiting professor in the Sloan School of Management at Massachusetts Institute of Technology, Harvard Graduate School of Business Administration, University of Kansas Business School, the HC. Mathur Institute of Public Administration in Jaipur, India, Texas A.&M, and an adjunct professor at Boston University School of Business Administration) and Pace University Graduate School.

Dr. Levinson consults with and lectures to many business, academic, and government organizations. He is the author of a

number of books, including The Exceptional Executive, which received the McKinsey Foundation and Academy of Management awards as one of the five best management books of 1968. His latest work (with Stuart Rosenthal), CEO: Corporate Leadership in Action, is a study of Chief Executive Officers in six of America's largest corporations, which won the American College of Healthcare Executives 1986 book award.

In the world of business, where achievement is of critical importance, success over the long term has been attributed to many factors. But in my opinion, the key element lies in a leadership style that gives direction, evolves structure, and allocates power. As the old corporate parental model—in which managers serve as authority figures and workers take dependent, childlike roles—gives way to a new environment where employees want and are encouraged to take more initiative, people are being abandoned left and right. Executives are not supportive enough of the people in their organization.

What's happening has a lot to do with the difference between *authoritarian* and *authoritative* leadership.

Like parents who have been made to feel guilty for taking a stand with their kids, many executives are reluctant to exercise authority. But the appropriate exercise of authority is the essence of good management behavior. Managers who are also leaders set high standards. They expect tight deadlines to be met. They clearly define appropriate behavior for their subordinates. And, they do it with an attitude of support for their people.

“... the appropriate exercise of authority is the essence of good management behavior”

When you work for a leader, you know he is on your side, trusts you, and wants you to grow toward your career and personal goals. That says to the employee that the leader can be trusted, and, by extension, so can the organization.

Authoritative leaders win cooperation from people they are leading by making them part of the process by which high standards, goals, and deadlines are set.



*From **The Consultant**: Volume 3, Number 2 (1987).

Dr. Levinson passed away in June 2012 at the age of 90.



Authoritarians, on the other hand, do these things in a vacuum, because they don't have the high self-esteem necessary to share the decision-making process and still take the organization in the direction they think it should go.

Leading through a major transition

When I studied the individual management styles of Reginald Jones of General Electric, Walter Wriston of Citicorp, and others, I found that they *led their companies through a major transition by taking a stand*. They set a clear direction, and brought the rest of the organization along. That's how a leader gives his organization character, a sense of values, and a center of cohesion.

"... leaders win cooperation from people they are leading by making them part of the process by which high standards, goals, and deadlines are set"

Taking a stand, of course, can be painful and lonely. We Americans are uneasy about having our subordinates, friends, relatives, and particularly our children, angry with us. Leaders know that it is all right for their people to be angry with them, and that they need time to work out their anger. A true leader is able to tolerate the discomfort that comes with taking a stand and creating a vision. This is part of the reality of power.

Leadership and change

In implementing their power, leaders take great pains to communicate effectively with their people. With the issue of change, for example, they are very clear about what is going to happen, and when. When anger arises, because the change is so difficult for everyone in an organization, the leader helps people to process it by encouraging them to talk about what kinds of problems the change will create, what difficulties they anticipate, and what must be taken into account in implementing the change. He also encourages people to express their feelings about what's going to happen. He makes it his business to be aware of his own thoughts and feelings, and to find out what his people are thinking and feeling.

The two most difficult things for managers to do well are praise their people when they do a good job, and level with them when they fall short. Leaders do both, without being paralyzed by the guilt that many people feel about taking charge and directing others. They deal with people in a straightforward manner, and communicate with them openly. They really do care about what happens to their employees, and they show it. They help people to resolve their differences, and are sensitive to people's self-esteem and face-saving needs.

Leaders also love to be mentors and to develop others. They are talent scouts and people growers. They are comfort-

able with their own aggressive side, and their sense of who and what they love; thus they can enjoy the rough and tumble of relating to others. Consequently, they do it superbly.

Let me sum up my views on leadership versus just management:

1. Strong leaders—not good managers or executives—are necessary for organizations that must undergo significant change.
2. Leadership that builds changing organizations into larger and better social instruments will not achieve its ends by consensus. Permission, yes. But consensus, no.
3. The leader must have a highly developed capacity for abstraction, for vision, and the strength to take charge. He must pull his organization into the future.
4. The leader must serve as an identification figure—yet he must also be attentive to detail. He must fight the tendency to overcontrol, but he cannot hang loose without creating chaos.
5. When one is in love with one's work, then the extraordinary hours are like play. Leadership, as play, leads to triumphs of the human spirit.
6. The leader has to be a great storyteller. People come a long way to share in his stories, his fantasies. The leader has always been at the center of the community. We cannot do without him.



SAMPLE CASE STUDY

My company is a global manufacturing company in the electronics industry. Our annual sales are \$6.5B and we have 9,300 people worldwide. We are structured into business units that are organized by geography and across multiple product lines.

My role is the director of development for two of our new products that are fundamentally different products from anything we have brought to market in the past three years. In the electronics field this has been a bad thing for us. Think of how often you look for "new," not just modified, technology.

My boss, David, is the VP of R & D. I manage a group of researchers who are all prima donnas at some level. My biggest headache right now is Roger. Roger has been the principal engineer driving the most exciting and innovative of our new products. Roger is the manager of a number of entry- and mid-level engineers and their research associates. My colleague Sue and the people who work for her are part of the story here.

Roger has a huge ego and the only thing bigger than that might be his creativity. He has been getting an enormous amount of attention about this new product. Sue's people are involved in the testing of the prototype against existing technologies to ensure compatibility issues. Roger has been "in the face" of one of her testing engineers, Frank, almost non-stop. Roger has bullied Frank to cut corners and report results in a way that could compromise the full integrity of the data. Clearly, if this new product isn't tested rigorously and with the utmost attention to every detail, we could launch something that would end up making us look foolish, damage our branding, and impact our bottom line.

I have been coaching Roger about the way he talks to people, the way he exerts undue influence on others, and the fact that he is creating people problems all over the place. He just doesn't see it. I might as well be talking to a brick wall. Sue is in my office daily and her frustration is escalating into behaviors that are unprofessional. I don't know what else to do. My boss is unsupportive because of Roger's technical contributions. Any and all help is appreciated.

CASE STUDY
ORGANIZATIONAL CHART

