

Healthia Consulting  
Manager's Guidebook

*Supporting Excellence in Consulting  
Through Effective  
Staff & Engagement Management*

## Introduction: On Being A Manager

Congratulations on being part of one of the most important aspects of Healthia operations: the management of our consultants, the resources most vital for our continued growth and success.

This guidebook is designed to provide you with the information and advice you need to effectively support, grow, and yes, manage your staff members in order to ensure that we maintain the level of excellence in consulting that has garnered us the reputation & success we've enjoyed thus far.

In the pages that follow, you will learn about what Healthia expects of its management team. You will also receive instruction on ways to approach some of the key components of your role as a manager:

- Developing your staff
- Managing people & assignments
- Managing the performance of your staff
- Serving as a leader within the company & without



## Chapter 1: Summary of Your Responsibilities As a Manager



This chapter is meant to provide you with a brief overview of what Healthia expects from you in your staff management role. Consider this as your handy reference guide to life as a manager at Healthia!

Management Area	Summary	Frequency
Career Development	Create a complete career plan, updating quarterly	Monthly & Quarterly
People Management	Conduct a call or in person meeting at least once a month with each staff member	Monthly
Performance Management	Complete quarterly & annual evaluations & review with your team	Quarterly & Annually
Assignment Management	Touch base at least monthly with staff regarding their current assignment	Monthly
Leadership	Always model our core values	Continually

## Chapter 2. Career Development

As a manager, you have a unique opportunity to play a very important role in the lives of other employees. One of your primary responsibilities is to support the career growth & development of your staff. As you most likely know yourself, feeling like you have opportunities (and a plan for) your professional growth is of utmost importance to your job satisfaction. So, it's no surprise that your staff members feel the same way, and are in need of support to help them establish and maintain their desired level of professional development.

At Healthia, we are committed to supporting the development of our employees. This makes not just business sense (better trained, more satisfied consultants means more marketable, and more satisfied clients), but directly supports two of our core values: adaptability and practicality. In the sections that follow, you'll learn about the expectations we have regarding your role in your staff's career development, the tools & processes we have in place to facilitate this process, and give you some coaching on how to work with your staff to create professional development plans. Should you be new to this role or desire to learn more, look to the "Practical Reference" guide for information on how you can develop yourself!

### Review of Career Growth at Healthia

- A. Career pathway overview [\[Insert pathways overview here\]](#)
- B. Growth options [\[Insert growth pathways detail here\]](#)

### Coaching for Career Development

#### Overview

Coaching your staff in their development may seem like a daunting task. Every manager asks his/herself at one point in their career, "How do I talk to my staff about their careers?" There's no need to feel badly if you're not sure where to start, as unfortunately, few people ever receive any formal (or informal) training on how to effectively coach for career development. At Healthia, we aim to provide you with some level of formal instruction (via the "X Course"). However, if

you haven't yet had a chance to take this course, following are some pointers on where to start and how to continue conversations with your staff about their growth and development.

The best place to start when trying to find your way with approaching your staff's career plans is to take a step back and think about your own work history. Think about work experiences you've had when you had a complete career plan and felt supported in your professional development. Then, think about work experiences when this wasn't the case. What can you learn from these experiences? What did your mentor/boss/colleague do to support you? What do you wish they had done? If you had had the "perfect" mentor early on in your career, what advice would they have given you to get you to where you are right now (which is hopefully where you want to be)?

Coaching for career development begins with a conversation. If you take a few minutes to think about the conversations your mentors have had (or conversations you wish you've had) over the years, you'll probably get a good sense of where to start when discussing things with your team members.

Once you've had a chance to reflect and think about how you want to approach things with your team (as, after all, we all have our own management style, so you should strive to approach this in a way that feels "natural" to you), set up a time with your staff member to discuss his/her career goals and start the process of developing a plan. You might want to use our Professional Development Profile form or your own "cheat sheet" of questions to guide the conversation.

The best place to start is the simplest: ask your staff member about their career aspirations. In some cases, they'll have a very clear vision of where they want to go (or grow) and you can just let them talk through their desires. In some cases, they'll be unsure of what they want or even what their options are. This is when you need to be ready to ask some thoughtful questions and open up the conversation so that they can see and think about the possibilities.

The key during this initial conversation is to identify what sort of support and coaching they need. The goal should be to come up with at least an initial set of goals, some short term (less than one year), some mid term (1-3 years), and some long term (3+ years). Reassure your staff that these can change, as certainly few of us know

exactly where we want to be years from now! You just want to have the shell of a plan in place so that you & your staff have a roadmap to follow. While the path your staff travels may change over time, its critical there is something in place to guide them!

### Developing Individualized Plans

#### Short & long term goals

The key to developing a good career plan is the establishment of a set of short, mid-, and long term goals. These goals should be realistic (something that fits into Healthia's business model and core values), achievable (something that Healthia can support operationally and financially), and meaningful to the individual (something that they want for themselves). Short term goals can be finite activities (attending a class on a specific software application, for example), or can feed longer term goals (taking a course as part of an MBA program, for example). Longer term goals

When it comes to helping your staff to establish career goals, its important to understand what activities they can pursue that will help them to achieve these goals. The most commonly considered types of activities are those that provide more formalized developmental experiences. These are things like:

- Vendor software training
- Other classroom/seminar training (via a degree program, industry seminar, etc.)
- On the job (having to learn a new skill in order to succeed on a particular project)



Given that time and money for formal education are finite (and some people may reach a point in their career when they no longer strive for more formal education), it's very important to be creative about identifying less formal growth activities. These are the "bread and butter" of professional development, as they comprise the majority of activities individuals will have available to support their career plans. These types of activities include:

- Internal projects
- HIMSS/other industry groups
- Other volunteer



#### Continuing the career development conversation

Once you've worked with your staff to come up with their initial set of goals and at least the outline of a career plan, you're ready to embark on your shared journey, working together to move towards the achievement of you staff's professional development goals. Here are some things you should do to keep the conversation going and ensure that the two of you are regularly checking out the roadmap and deciding if a change of direction is in order:

1. Review goals (which should be documented on the Quarterly & Annual Progress Tracker form) on at least a monthly basis, via a face to face meeting (ideally) or telephone call
2. Outline the specific milestones/steps that support a particular goal. These should be realistic & achievable
3. Review & adjust these plans on at least a quarterly basis

### Healthia Documents & Resources

- *Quarterly & Annual Progress Tracker* - Our key performance management tool
- *Professional Development Profile* - An optional tool you can use to get to know your staff & get them thinking about their short and long range career goals.

### Further Reading & Instruction

- Coaching for Career Development, internal course



### Practical Reference

- Use your own career development experiences (good and bad) to help you in finding the starting point for discussing your staff member's own career development
- Look to Healthia's career pathways to guide your conversation about your staff member's short and long term career goals (as well as to guide identification of growth opportunities)
- Every employee must have a career plan and set of supporting goals
- Consider both formal and information development activities to help your staff reach their goals
- Career development is an ongoing process: Review plans and goals regularly

## Chapter 3. People Management

As a Manager, your most important responsibility is to support your staff members. "Support" can be a rather ambiguous word, however. What do we mean when we ask you to support your staff? What we're saying is that we expect you to:

- Mentor their career growth, providing them with guidance & facilitating opportunities for them to develop new skills & experiences
- Provide regular feedback on their performance, giving them input on where they excel and areas in which they should grow
- Ensure they are following Healthia policies & procedures
- Ensure that their concerns are being heard and addressed as appropriate
- Address performance issues & concerns in a direct and supportive manner

In short, when we ask you to support your team we are expecting you to be an effective people manager.

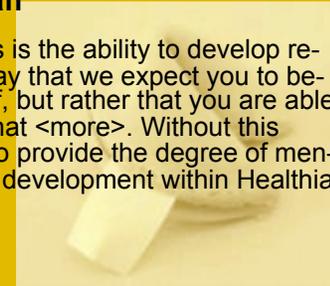
### Key Qualities

In order to provide you with some more specifics on what we expect of our Staff Managers, here is a brief summary of the qualities that you need to ensure you have/develop in order to be effective in supporting your staff:

- **Empathy** - this means the ability to truly be present & hear your staff member's thoughts, feelings, desires & concerns
- **Insight** - ability to turn your observations of your staff as well as their own input and turn these into specific words of guidance or action items in a career plan
- **Strength** - the ability to provide firm guidance when needed to ensure staff are following Healthia's policies & procedures

## Developing Relationships with Staff

Primary to supporting you staff members is the ability to develop relationships with each one. This isn't to say that we expect you to become best friends with each of your staff, but rather that you are able to connect with each team member so that <more>. Without this foundation, it will be next to impossible to provide the degree of mentoring necessary to guide their growth & development within Healthia (and beyond).



### Assessing individual style

The "hows" behind fostering and maintaining relationships are best left to more formal and personal training. If there is one key piece of advice we can offer you via this guidebook it is this: Approach each staff member as the individual they are and learn what their personal "style" requires of you as their manager. Each management relationship is unique (though there are some commonalities that we will touch on shortly), and so you need to approach each with the question: How do I need to "modulate" my approach to best meet each staff member's own needs?

### *Personal*

Before you are able to tailor your management and coaching to each individual, it is important to first be conscious of your own management style. Just as every person needs to be managed a bit differently, every manager (ahem) manages to their own personal style. Take a few moments to think about how you see yourself as a manager. Are you more extroverted? More introverted? Prefer face to face or "virtual" contact? What abilities do you feel are your strengths? Which ones do you know need further growth? What aspects of management feel most comfortable to you? Least?

The answers to these questions are critical to consider \*and\* to remain conscious of: they will serve as the foundation to your understanding of yourself as a manager, mentor, employee, and indeed, friend. Consider one example: If you are more extroverted in nature

We are not asking you to change your very nature in order to be a "better" manager, but to be aware of your own style so that you are aware of how it impacts your staff.

### *Coachee*

Once you're aware of your own identify as a manager, you'll find it much easier to both assess and find a "fit" with your staff's individual styles. You will find that each of your staff members has significantly and/or slightly different things that they need from their manager. As equally (if not more) important is that each staff member will require a different approach in order for you to effectively manage them. Your more extroverted team members will more likely make the effort to keep in touch with you, while those who tend to be more introverted may require you to make an extra effort to reach out to them. In order to establish the best management relationship, you will need to learn, essentially, what makes each of your team members "tick."

Even though every person on your team is unique, we can provide you with some generic "styles" that will get you started in thinking about how to develop a management relationship with each staff member:

- Introverted/extraverted - determine if your staff members tend to be more internally or externally oriented
- High need - determine if they want lots of contact with their manager
- Low need - or relatively little
- Direction needed - determine if they like clear direction from you or prefer you to give them options to consider

Finally, if you're not sure how a particular staff manage would like to "use" you as a manger, simply ask them about which style of management works best for them!

### **Establishing & maintaining communication**

Learning what each of your staff members needs from you as their manager is the first (and most critical) step in establishing a solid mentor/mentee relationship. Certainly this process takes time, as in any type of relationship it's not one you can force to grow overnight. But, given time and an awareness of how your & their style "mesh," you should reach a point where the two of you are able to communicate well and enjoy a mutual respect for each other. It's at this point where the real management work begins.

Like any relationship, a key element to its success is time. Don't be discouraged if it takes a number of days, weeks, months for your to develop a comfortable relationship with your staff members. All good things take time. If you find yourself getting frustrated, talk to your manager for advice, or even better, ask your staff member what they need from you in order to make better use of your abilities to support them.

### **Mentoring**

*Practical*

*Project/knowledge*

*Career*

**Healthia Documents & Resources**

**Further Reading & Instruction**

**Practical Reference**

Dos & Don'ts

HR Policy & Law



## Chapter 4. Assignment Management

While the Business Development team and specific Account & Engagement Managers own the staffing process, as a Staff Manager you play an important role in assisting with the staffing process. When new resource requests are made by clients, the Business Development team looks for consultants with the appropriate mix of skills and experience that meet the specific needs of the request. Ideally, this process also includes the consideration of how a particular opportunity fits into a consultant's career goals.

As a Staff Manager, it is your responsibility to possess detailed knowledge of each of your staff member's skills and experience. This allows you to assist the Business Development team in identifying potential fits for a resource request, by either suggesting one of your team be submitted for an opportunity or by being able to answer questions about the qualifications your staff has for a particular project.

More importantly, your knowledge of your staff's experience and career goals allows you to be a strong advocate for them when the time comes for them to take on a new assignment. You should do your best to advocate for assignments that support your staff member's career plans. And, if you feel like a particular opportunity is a bad fit (be it due to their specific background or because the assignment would present significant job satisfaction issues), you must speak up and let your concerns be known. No one else will know your staff better than you, and most likely, they won't be around to speak for themselves during the staffing process.

### Working with Engagement/Account Management Team



### Healthia Documents & Resources

Weekly staffing report

Professional Development Profile



### Further Reading & Instruction

### Practical Reference

- Become deeply familiar with your staff members' work experience, skills, and abilities
- Attend the Tuesday morning manager's calls so that you are aware of possible new opportunities as well as specific resource requests

## Chapter 5. Performance Management

Thus far we've been focusing on the pillars of staff management: People Management and Career Development. A thread that runs through all the activities related to these two management areas is performance management. This sounds like a "mean nothing," HR term, but if we step back and look at it, we'll see what a choice pair of words we have. In consulting, the ability to perform at a high level of skill and quality is essential to keeping existing clients and developing new ones. Without a high performing team, we will fail. Thus, it's easy to see how the management of the performance of our employees is critical to our success.

Let's look at this a slightly different way. Imagine yourself as the lead mechanic for a race car driving team. Your job is to make sure that every aspect of the vehicle works to its optimal level of performance, knowing that failing to do so will result in the race being lost. Some parts will need a firm hand to work well, others a gentle tweak. Your job is to identify what needs to be worked on and make sure that the tweaks and fixes are made.

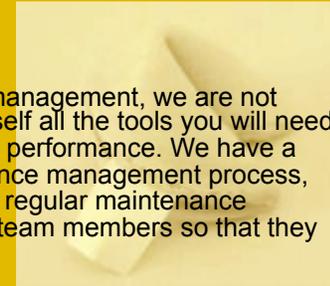
Now, apply this analogy to the performance management of a team of consultants. You are the "pit boss" of your team. Your job is to identify what needs work in order to get the best performance out of each member of your team. In many cases, this just requires working with your staff to develop comprehensive professional development plans, plans which include goals for improving on skills and gaining new experiences or knowledge. This type of "tweaking" entails your being a strong mentor, lending your insight to help your staff grow to their highest potential.

In rarer cases, you will have to focus on fixing a problem, due to a staff member who falls short of expectations or has demonstrated behavior that conflicts with our core values/standard expectations of professional conduct. While this is the rare occurrence, you will face situations where performance management requires a strong hand.



### Quarterly Objectives & Review

Luckily, when it comes to performance management, we are not leaving you on your own to find for yourself all the tools you will need to keep your team "tuned up" for optimal performance. We have a formal program that drives our performance management process, which will provide you with the tools and regular maintenance schedule to support the "tuning" of your team members so that they can perform to their highest potential.



The cornerstone of our performance management program is our quarterly objectives & review process. At the start of each quarter, you are required to work with your staff to establish their professional development goals for the quarter ahead. Additionally, you will be reviewing the results of the past quarter's goals, as well as providing structured feedback on how the consultant has been performing against our core values.

This is an absolutely critical and essential process for developing and maintaining a high performing team. We've already talked about the importance of establishing short and long-term goals, but what the quarterly review process also supports is the "stop and reflect" process that's critical for both recognizing strengths and successes and identifying opportunities for growth. You will be doing your staff a disservice if you fail to put the time and energy into preparing for and conducting your quarterly reviews. However the process should be relatively easy if you follow some basic guidelines:

1. Establish realistic & achievable goals (and make sure that the client-related goals have been vetted by the engagement manager) at the start of each quarter. These goals should support, if not drive, the staff member's long-term career goals.
2. Make sure these goals include the development of skills, knowledge, and/or abilities that have been identified as growth areas (use our career pathway competencies and core values as the guide for identifying growth opportunities).

3. Throughout the quarter, file away any feedback that comes your way from clients, colleagues, the engagement/account manager. It's a good idea to set up regular, brief "touch bases" with each engagement manager.
4. Towards the end of the quarter, solicit formal feedback from clients and colleagues.
5. Set up a face to face (if possible) meeting with each of your staff members as close to the start of the new quarter as possible.
6. Prepare for this meeting by completing the Quarterly & Annual Progress Tracker. Take time to do this - your staff deserves it! Ask your staff members to assess themselves as well.
7. Sit down and go over the tracker, acknowledging their successes and providing constructive feedback on their growth areas.
8. Brainstorm on any goals that should be added to their next quarter's objectives in order to address any growth areas.
9. End on a positive note!

## Annual Review Process

In many organizations, the annual review process is viewed with a certain degree of dread by manager and employee alike. Managers are faced with the daunting task of having to summarize a year's worth of work. Employees fear a less than positive review, often going into the process with no sense of how their performance has been viewed, as sadly the annual review may be the only time in a year that they receive detailed feedback from their supervisor.



At Healthia, the annual review period should not resemble any of the above qualities. Our quarterly review process should make annual reviews much easier to create and should not be a time when employee's are surprised by any performance-related issues. Since you will be conducting almost a mini annual review during each quarter, the annual review period is mainly a culmination of the information gathered during the past four quarters.



The quarterly review steps outlined above are very good steps to follow as you prepare for your annual review. The main difference is that the contents should be more detailed and the feedback should be more comprehensive. Also, you should use this as an opportunity for a comprehensive professional development plan review.

## Addressing Performance Issues

As mentioned earlier, it will be a rare case when your performance management duties involve having to address serious performance shortfalls. However, it is inevitable that you will need to take corrective action at some point as a manager at Healthia.

### Informal issues

Most performance issues that require intervention are more informal in nature (i.e. not due to an action taken by an employee that requires formal disciplinary procedures be followed). Examples of informal issues/concerns that need to be addressed are: concern raised by a client that a consultant demonstrates a negative attitude, concern raised by you that a consultant isn't following a basic company policy (say, being consistently delinquent in getting their time submitted to QuickArrow), or concern raised by a colleague that one of your staff members could use a little coaching in a specific area.

When these concerns are raised, the first thing you should do is gather all the information available about the situation or concern. Don't just run to your staff member! Talk to whomever brought you the concern and anyone else who has insight into it. In some cases, the root of the issue may have nothing to do with the consultant's behavior, but may be a misunderstanding or, worse case, the consultant may be "taking the fall" for someone else's problem. The worst thing you can do is approach your staff member about a performance issue when you don't have all the facts. They will have questions about the who, when, where, what, and why of the situation, so you must be prepared to answer them.

Once you have all the facts, set up a time to talk with your staff as soon as possible. In person is ideal, but if physical distance prevents this, set up a time when the two of you are somewhere you each can speak freely. When scheduling the meeting, simply tell the staff member that you have something you needed to discuss with them. In order to avoid having them dread each minute up to the meeting/call, try and leave it at that.

Once you two are together, open the conversation very matter of factly, telling them that you have some feedback for them/had something brought to your attention that you felt was important to discuss. Your job is to remain clam and matter of fact. This may well become an emotional situation, so you must remain centered and objective so that you can support them, however they may react.

Go over the facts of the situation, steering away from editorial comments wherever possible (this helps keep the focus where it should be, on the facts and not the feelings). Allow the staff member to ask questions, this should be a two way exchange and not your own personal monologue. Try to include positives in your presentation of the situation (complement them on something at least tangentially related). This is not to say you should downplay the situation, but since most consultants are highly self-critical, it's easier for them to hear what you have to say if you balance out the "critique" with some reminders that this doesn't mean that they have failed as a consultant.

Once you've gone over the situation/concern and detail and your staff member's questions have all been answered, you need to quickly move to creating an action plan. As consultants, we are trained to identify problems and move quickly to create a plan to resolve them. Your staff member will want a plan of action. This also gives them something to focus on other than any feelings they have of personal failure. Talk through the plan until you both are satisfied/in agreement. It may be something as simple as, "I will be more conscious of how my attitude affects my team." Once the plan is out-

lined, agree upon a time to check back on progress being made toward the plan (and then be sure to follow through on the check up).

End the conversation on a positive note. Thank your staff member for taking an active role in addressing the issue. Try and remind them of other areas in which they excel. If you have any worry that they will be overly self-critical after your conversation, be sure and check back with them in the next day or so. Many of us need a bit of time to absorb this kind of feedback, so it's not a bad idea to touch base to make sure they are "okay" with themselves.

### Formal/disciplinary

The rarest type of performance issues you will encounter are those that require formal intervention. All of these cases require that you work with HR to develop the appropriate documentation and agree upon how the intervention will proceed. Never try and address serious performance issues on your own! Proper documentation is critical for both the employee's benefit and Healthia's.

### PIP

<details>

### Termination

<details>

**Healthia Documents & Resources**

**Further Reading & Instruction**

**Practical Reference**

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## Chapter 6. Leadership

**Overview of Qualities & Expectations**

**Being a Leader**

Finding one's voice/becoming a change agent

**Strategic Thinking**

**Planning**

**Growth**



**Healthia Documents & Resources**

**Further Reading & Instruction**



**Practical Reference**