

# The search for effective physician leaders: new strategies for new challenges

By Kurt Scott, Director, VISTA Physician Search and Consulting

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**As our healthcare organizations become increasingly complex and competitive, the search for effective physician leadership has become a sink-or-swim issue.**

Physician executives today must have the ability to build new programs, fix ailing ones, secure referral and payer networks, manage professional staff, recruit new talent, understand and plan for budgetary and regulatory challenges, and much more. And the hard truth facing many organizations is that physician leaders of the past—often senior and very well respected members of the medical staff promoted into the job—may not have what it takes to lead in these interesting times.

On the one hand, I say kudos for understanding this change and focusing so precisely on this emerging need. On the other hand I say, “Get ready to rumble. You have entered the most competitive space in healthcare recruiting.” The following suggestions will help you gather the right team, build a solid plan, set expectations, avoid some common pitfalls, and find the best clinical executive for your organization, all within eight months.

### ESTABLISH YOUR EXECUTIVE SEARCH COMMITTEE

As a chief executive or chief medical officer, you know that recruiting new physician leaders is one of the most important steps in building or changing the culture and personality of your organization. It is very important to go into the process deliberately, with a clear idea of the change you need to make or the standard you need to uphold. The right search committee brings this vision squarely into the process.

Create a core Executive Search Committee that participates in ALL physician leadership searches, regardless of program or specialty. DO NOT create a different committee for each search; you will lose the consistency, vision, and the chance to build a team of “super interviewers” who understand your organization’s leadership needs. DO plan to add additional members to the core team based on the position you are filling.

The committee should be heavily weighted toward physicians, of course. Include community-based physicians who can positively influence their peers. Take the time to interview these physicians, and select those who can be positive and supportive of the position and your effort to fill it. In addition to an eagerness to “sell” the position, select members who are willing and able to critically assess candidates. Most importantly, core team members must be committed to taking the time and maintaining the flexibility to participate in first-round interviews.

### SET CLEAR EXPECTATIONS FOR THE COMMITTEE’S ROLE

Surprise—the Executive Search Committee doesn’t get to “pick the winner.” It is vitally important that committee members understand that their role is to evaluate, screen, and recommend candidates to the leader responsible for hiring and managing the new executive. The committee should present two or three candidates the entire committee can support for and in the position. They may rank candidates, but given the competitive nature of recruiting in this space, they must be comfortable and supportive of all recommended candidates, no matter who gets the job. The final decision must be that of the hiring leader—always.

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## FINE-TUNE AND AGREE UPON SELECTION CRITERIA

This is an important and often time consuming task, but an essential investment. Discuss the qualities and experience committee members believe the perfect candidate would possess. Discuss qualities and experience scenarios that are questionable or raise “yellow flags.” Come to consensus on criteria that are “required” and that are “nice to have.” Sticking by this list helps you evaluate candidates consistently, even if interviews are several months apart. More importantly, it ensures your compliance with EEO and Affirmative Action plans your organization may have.

Categorize your list and split it up among committee members, making each member consistently responsible for asking questions and assessing candidates in a particular area. This protects candidates from answering the same questions all day long and makes the interview process fresh and interesting for both sides. Of course every interviewer should feel free to ask general questions and to follow interesting threads of conversation.

It's always a good idea to provide a quick refresher on legal interviewing. Contact your HR department for assistance. This is very important to the success of your process and the protection of your institution.

## CREATE A “RESOURCE COMPENDIUM”

The hiring manager should begin compiling a resource compendium outlining all the information about the job and department the candidate will lead. The compendium will include such things as:

- Organizational chart(s)
- List of personnel (doctors, mid-levels, nurses, administration, and support staff)
- Copies of staff CVs
- Full outline of services provided, programs offered, etc.
- Special procedures offered
- Special equipment
- Hours of operation
- Budget reports
- Revenue reports

- Square footage and layout
- Opportunities for growth
- Challenges or roadblocks
- Research activities
- Educational opportunities
- Department turnover and recruitment activities

Start this process early. It may take a month or two to complete.

## SCREEN IN BEFORE YOU SCREEN OUT

In any search, it's best to cast your net as wide as possible at first. You want a large candidate pool going into your recruitment “funnel.” Yes, it's time consuming, but it gives you essential context in which to compare candidates, opens your committee's thinking up to more options and possibilities, and energizes your organization with each new encounter. The screening process gets tougher as candidates work their way through the process.

Take note, too, that screening great candidates is relatively easy. So is screening out weak candidates. Your challenge will be to train and motivate committee members to screen candidates who seem to fall in the middle.

## THE SCREENING PROCESS

**Self-selection**—Make sure the advertising, web postings, outreach postings, email and direct mail campaigns created for the position contain enough information about the position and the community to allow candidates to make an informed decision about the potential fit of the job. Physician executives appreciate straightforward, relevant information about compensation, incentives, resources, teaching and research expectations, administrative/clinical mix, and leadership scope. They will need basic community information as well.

Creating a dedicated “landing page” on your organization's website is an excellent way to give candidates enough information to opt into your recruiting process. Include the URL in all advertising so candidates can get directly to the pertinent page. The page should branch off of your “Careers at...” or “Opportunities for Physicians” section to provide

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easy navigation to general recruiting/HR information. This page should focus specifically on the leadership opportunity and introduce the candidate to the mission and reputation of the organization and the department seeking leadership, potential colleagues, and related efforts throughout the institution. This is a great place to expand on the benefits of the position and to highlight community attractions and resources.

**First phone interview**—Whether you are using a recruitment agency or an in-house recruiter, use the first call as a high-level screening tool. Cover the items in your “required” and “nice to have” criteria lists thoroughly so you know any candidate who makes it to a second interview is qualified. Make sure your recruiter gathers as much information as possible about the candidate’s experience, personal and professional motivations, and other job prospects or prospecting in the works. It’s often easier for professional recruiters to ask some of these questions and speak candidly with the physician about the fit of the job. Let them be your super screeners. The recruiter can outline the compensation package being offered, but only the hiring manager should negotiate with a candidate.

**Second phone interview**—Next, a member of the Executive Search Committee should conduct a phone interview with the candidate. He or she should use the criteria list to guide the interview, but should not be constrained by it. He or she should use open-ended questions to create a dialog that lets more of the physician’s character and personality come through. Behavior-based interviewing—essential saying, “Give me an example of a time you...,” or “Tell me how you handled a situation like...” are great ways to move candidates from generalities to specific, meaningful answers.

**Present candidate to committee**—The committee member who conducted the interview should “present” the candidate to the full committee. Building on the profile started by the recruiter in the first phone interview, the committee member should review the candidate’s qualifications against your criteria, relevant experience, interest in the position, fit with the position and the organization, and any potential red flags. The committee member should offer a recommendation as to whether the candidate should be invited to the first round of on-site interviews.

**On-site interviews**—Scheduling may actually be the hardest, and most crucial, aspect of the on-site interview process. Committee members must be willing to keep their schedules flexible so you can get top candidates in quickly. Remember, desirable candidates are not just desirable to you. There will be competition from other organizations. It’s important to build on the momentum of the initial interviews. Cancelling an interview the day of the visit will kill that momentum faster than anything. Don’t let it happen! Distribute an interview evaluation form to all members of the committee and make sure they are completed the day of the interview.

**Spouse recruitment**—Paying careful, deliberate attention to the needs and preferences of a candidate’s spouse is tremendously important because the spouse’s level of interest contributes at least 50 percent to the overall decision. Recruit a group of committee members’ spouses to serve. The group should include a variety of ages, gender, interests, and work situations. You do not need to ask the entire group to meet with each interviewee’s spouse. Pick and choose based on similar interests.

Spouse recruiters should be willing to do some legwork for the family prior to the visit. They may be asked to check out special schools, for example, or to help target areas to include in a tour with a realtor. This team should plan on having lunch with the spouse on interview day, joining the community tour with a realtor, and assisting with introductions at any evening functions planned. In the best case, a member of this team will strike up a friendship with the spouse and be available to answer questions during the recruitment process and help out during the relocation process if applicable. Never underestimate the importance of spouse recruitment.

## ON-SITE INTERVIEWS THAT WOW THEM

The competition for great physician leaders is intense. You have to develop an on-site interview process that far exceeds candidates’ expectations. Your goal is to have each candidate leave your organization feeling like he or she is THE most important candidate, THE ONE in your eyes.

**MAKE SURE** your recruiter gathers as much information as possible about the candidate’s experience, personal and professional motivations, and other job prospects or prospecting in the works. It’s often easier for professional recruiters to ask some of these questions and speak candidly with the physician about the fit of the job. Let them be your super screeners.

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This requires that you customize the interview to the needs and preferences of each candidate. For example, a candidate who expresses an interest in research should spend a good amount of time with leaders and colleagues in that area. Schedule 45 minutes for each interview, with a 15-minute buffer to allow the candidate and host to get to the next interview on time. Make sure water and bathroom facilities are easily accessible.

Always assign a “host” to shepherd the candidate to interviews and appointments. He or she should be conscientious about maintaining the flow of the day, keeping interviews within time limits, answering questions as they come up, and developing contingency plans if things get off track. The host should be alert to potential “red flags” in the candidate’s behavior or comments, and alert the hiring manager as soon as possible. This will allow the hiring manager to investigate or address an issue immediately.

The host should also be a warm, subtle advocate for the candidate, a great contribution to the selling process.

Selecting a savvy realtor is another important success factor. Recruit a realtor who will act and be perceived as an extension of your organization. Make sure the realtor contacts the candidate and spouse before the on-site interview to develop a good understanding of their needs and priorities. The realtor should lead a valuable, time-wise community tour that leaves the candidate and spouse feeling that the community could work for them and they have a place to start further investigations.

## ROUND ONE

The first round of on-site interviews should be conducted by members of the Executive Search Committee, plus any ad hoc members closely connected to the search based on position, specialty, or candidate’s area of interest.

Remember that ad hoc members should have been recruited to the committee at the outset, and should be very familiar with the position and criteria you have established. For example, if you are recruiting the Chair of Neurosurgery for your facility, you may include the Department Head of Neuroradiology, the VP of Operations for Neurosciences, and the Department Head of Neurology.

As noted each Executive Search Committee member should be assigned a section of the criteria to focus on but should feel free to let the conversation flow naturally to areas of interest to candidate or interviewer.

The Executive Search Committee should meet weekly to discuss and evaluate candidates interviewed that week. The job of the committee, remember, is to recommend candidates with the highest likelihood of success who should move on to Round Two.

## ROUND TWO

The second round of interviews should be conducted by additional Executive Search Committee members plus the organization’s executive leadership team, including the CEO, CMO, and COO. Leaders from other departments can be included based on the position and the candidate (e.g., the VP of Information Technology or the Director of Graduate Medical Education.)

Once again members of the Spouse Recruitment Committee should be included because the spouse’s level of interest can make or break the deal. In addition, as committee members spend time with the spouse they will uncover any potential family issues that might influence the decision or fit for the position. For example, in one recent situation a candidate had a son in a very challenging magnet high school, despite the son’s mild learning disability and need for slight accommodation. A member of the Spouse Recruitment Committee set up brief appointments for

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the parents to meet administrators at two schools in the new town, which gave the parents confidence that their son could find a positive fit at one of the schools.

The Executive Search Committee should meet immediately after all second round interviews are complete to do a final review of all candidates. They should make final recommendations in support of the top two or three candidate they can fully support for the position. These candidates' profiles and interview summaries should be presented to the hiring manager.

## THE FINAL STEP

The hiring leader should then ask the top candidates to prepare a Vision Statement for the department. The statements will be up to 30 pages long, and will include major goals for the next three years, major programs to be developed or enhanced, staffing levels, revenue projections, required resources, potential obstacles or challenges, and major equipment to be purchased.

A tall order, but yes, it is feasible to require this of top candidates. By this stage, the candidates have had at least two interviews and received the resource compendium outlining all of the information about the job and the department that they will need.

Vision Statements provide great insight into candidates' experience and perspective. Sometimes your second choice candidate emerges as the top choice through the process.

The hiring leader will base his or her decision on the profiles, the interviews, and these statements.

## THE OFFER AND THE CLOSE

If executed correctly, closing the deal actually starts during the offer stage. The offer should be made verbally by the hiring manager first. Tell the candidate that no paperwork will be sent out until a verbal agreement is reached.

This may sound strict, but it is very important. It is not at all uncommon for a candidate to take a client's contract or letter of offer and "shop it around" to other potential openings during the negotiating process. Don't open your organization up to this risk. It's also true that candidates want what they don't have, so the offer letter is a powerful closing tool.

It is more effective to get the candidate to decide if this is truly the position he or she wants, and under what circumstances. Coach the candidate to put together his or her entire list of wants and desires. It is in the candidate's best interest to compile and submit the whole list at one time and NOT ask for something new in every call. If they do, it looks like they are trying to "hold up" your organization. They quickly lose credibility and sometimes lose the job all together.

Once the negotiation process is completed and the candidate accepts all of the terms, you can put together the appropriate paperwork and send it by registered mail with a return receipt requested.

The agreement should have a seven-day expiration date, which you can extend if you choose. This is important for the reasons discussed above. It also allows you to rescind the offer if necessary.

Now, take a deep breath. It is not often a candidate goes through this whole process and then turns down the job at the eleventh hour.

Bringing the candidate on successfully—also known as "on-boarding"—and physician retention will be the subjects of our next whitepapers.

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## How the process unfolds

How long does it take to recruit top executive leadership for your organization? Not as long as you might think. Our experience shows that many organizations make the mistake of equating the length of the process with the seniority of the position. We think just the opposite—that a very focused pool of candidates is qualified for the highest level of positions. Therefore, suitable candidates can be vetted relatively quickly. Our average time-to-fill physician executive positions is seven to eight months. Here is an outline of the process and timeline we employ with executive search clients:

### Month 1

- VISTA team and the organization's Executive Search Committee meet to develop the criteria by which all candidates will be evaluated; a revised job description is developed if appropriate. VISTA assists with the development of an attractive offer package if necessary. VISTA advises the client on the composition and roles of this committee and helps set expectations (i.e., being available for interviews, completing assessment sheets on the day of the interview). Training is provided on legal and effective interviewing techniques if necessary. A spouse recruitment team is also assembled and trained.
- VISTA develops and implements a marketing/sourcing plan that may include advertisements in targeted journals, job board postings, direct mail, calling campaigns, development of a position-specific website with integrated sourcing, executive networking, and more, depending on the position.
- CVs may begin arriving by the end of Month 1; they are received, tracked, and prescreened by VISTA.

### Month 2

- The bulk of CVs should be expected in Month 2. VISTA receives, tracks, and prescreens.
- VISTA conducts phone interviews with promising candidates and prepares a detailed Candidate Profile on those who should be considered. Profiles are presented to the Executive Search Committee for consideration.

- VISTA facilitates a meeting of the Executive Search Committee to review candidates presented. Candidates who are recommended by the committee move to the next phase. VISTA schedules phone interviews for these candidates with a member of the Executive Search Committee.
- Phone interviews occur between the candidates and committee members and top candidates are recommended for on-site interviews.
- VISTA works closely with the client to create an effective on-site interview process, including spouse interviews and a community tour with a realtor. (It is possible to have one or more 1st round interviews occur in Month 2 but more probable for Month 3.)

### Month 3

- VISTA schedules and coordinates 1st round on-site interviews.
- Newly sourced candidates are vetted and start through the evaluation process.
- Some first round interviews will occur.
- VISTA meets with the Executive Search Committee toward the end of the month to review interview evaluation summaries and make recommendations as to which candidates will move to 2nd round interviews.

### Month 4

- 2nd round interviews are scheduled; some are completed in Month 4.
- Some additional 1st round interviews are scheduled and completed this month as well.
- At this point in the process, any new candidates who surface will be measured against the candidates already being considered. Only those clearly capable of bringing something outstanding to the table will be put into the mix.

### Month 5

- The remaining 2nd round interviews are scheduled by VISTA and completed.
- Any outstanding new candidates will be scheduled for 1st round interviews.
- VISTA meets with the Executive Search Committee to review interview evaluation summaries and make recommendations as to who proceeds in the process. (1st and 2nd round interviewees)

**Month 6**

- Any remaining candidates still going through the process are interviewed and evaluated and recommendations are made.
- VISTA works with the committee to select the top 2 or 3 candidates, who are then recommended by the committee to the hiring leader.
- These chosen candidates are asked to prepare Vision Statements for submission to the hiring leader. (VISTA helps the Executive Search Committee and the hiring leader develop criteria and a format for these statements. The Vision Statements may or may not be shared with the committee.)

**Month 7**

- The Vision Statements are reviewed with the Executive Search Committee and a decision is made as to the top candidate for the position.

- A verbal offer is made to the candidate of choice. VISTA coaches the hiring leader on how to approach this call to make the negotiations effective and decisive. The goal is for the hiring leader to get a verbal acceptance PRIOR to paperwork being prepared and mailed to the finalist.
- The written offer is accepted by the candidate, or not, in which case the second candidate in line is contacted with a verbal offer.
- The agreed-upon relocation process is implemented.
- The selected realtor and members of the spouse recruitment team act as "feet on the street" to assist the family with relocation details as necessary.
- VISTA helps the hiring manager structure an "on-boarding" process for the candidate.
- System-wide, community, and national announcements are released.
- VISTA requests a post-engagement evaluation from the hiring manager and the Executive Search Committee.

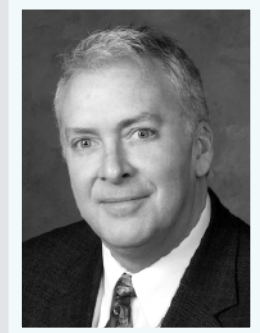
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**ABOUT THE AUTHOR****Kurt Scott, Director**

Kurt Scott joined VISTA Staffing Solutions in 2005 to establish a Physician Search and Consulting Division for the organization. Today VISTA provides retained, success-based search services for clinical, clinical academic, and clinical executive positions. The division also provides consulting service to help build, enhance, or supplement in-house recruiting programs. Kurt is past president of the Association of Staff Physician Recruiters, where he was active in training new in-house physician recruiters. He has consulted with departments across the country to help them develop staff, systems, and tools to help them meet the increasing demands recruiting programs face.

Prior to joining VISTA, Kurt Scott led the recruitment department and recruited all physician executives at Geisinger Health System. Over a 10-year period he filled more than 100 physician leadership positions including Chairs of Surgery, Pediatrics, OBGYN, Internal Medicine, Radiology, Anesthesiology and dozens of others.



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