

**LEADING TODAY,  
SHAPING TOMORROW:**

**THE TOP 10 MUST-HAVES FOR  
CASE MANAGEMENT LEADERSHIP**

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**Agenda**

- Introduction
- The Top 10 Leadership Must-Haves
- Practical Strategies & Applications
- Reflection & Action Planning
- Q&A / Closing

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**Learner Objectives**

1. Identify the top 10 leadership essentials in case management.
2. Apply strategies for coaching, mentorship, and professional development.
3. Develop an action plan to strengthen leadership and succession planning.

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Why Leadership in Case Management Matters

-  Increasing patient complexity
-  Regulatory demands
-  Financial pressures
-  Staff support & engagement

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The Leadership Challenge

- Rapid policy changes (value-based care, ACOs, AI integration).
- Increasing complexity in care transitions and reimbursement models.
- Need for emotionally intelligent, data-literate, and strategic leaders.



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Colleen's Top 10 List for Leadership

- Communication
- Emotional Intelligence
- Critical Thinking
- Strategic Alignment
- Mentorship
- Succession Planning
- Collaboration
- Advocacy
- Data Mastery
- Adaptability

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**Communication**

- Clear, concise, and audience-specific.
- Adjust messaging for staff vs. executives vs. patients.
- Listen actively and close the communication loop.

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**Development Strategies**

- Enroll in workshops on *executive communication* or *crucial conversations*.
- Practice **SBAR** (*Situation, Background, Assessment, Recommendation*) framing in both clinical and administrative communication.
- Request 360° feedback on communication effectiveness from staff, peers, and leadership.
- Record and review key presentations or team meetings for tone, pacing, and clarity.



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**Emotional Intelligence & Communication**

- Self-awareness and empathy
- Conflict resolution & transparency
- Example: Leading difficult family conversations

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## Development Strategies

- Complete a validated EI assessment (e.g., EQ-i 2.0, MSCEIT).
- Practice mindfulness or reflective journaling after challenging interactions.
- Engage in coaching or peer debriefing sessions to explore emotional triggers.
- Study nonverbal communication and active listening techniques.



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## Critical Thinking

- Identify root causes, not just symptoms.
- Analyze patterns and synthesize across systems.
- Make data-informed, evidence-based decisions.

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## Development Strategies

- Attend workshops or CE on *Root Cause Analysis (RCA)*, *LEAN*, or *Six Sigma*.
- Engage in "assumption audits" before making key decisions.
- Practice Socratic questioning ("What evidence supports this?" "What else could be true?").
- Read case studies and deconstruct the leader's decision-making pathway.



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**Strategic Alignment**

- Tie every project to enterprise pillars: quality, safety, cost, experience.
- Speak the language of executives—outcomes, ROI, KPIs.
- Align goals to the organization's strategic plan.

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**Development Strategies**

- Review your organization's strategic plan and identify where case management adds value.
- Partner with finance or quality departments to align dashboards to system goals.
- Attend leadership meetings and track strategic terminology and priorities.
- Build business acumen through courses in healthcare finance or strategic planning.



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**Mentorship**

- Provide guidance, feedback, and encouragement.
- Model professional integrity and accountability.
- Create mentorship moments in daily work.

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## Development Strategies

- Participate in formal mentorship programs (e.g., CMSA Mentorship Program).
- Study adult learning principles and coaching techniques.
- Maintain a reflective mentoring journal documenting mentee progress and insights.
- Shadow experienced mentors to learn their style and methods.



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## Succession Planning

- Identify and prepare potential successors early.
- Document processes and decision rationales.
- Build redundancy, not dependence.

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## Development Strategies

- Create a leadership competency matrix for your department
  - Clinical ladder
- Identify high-potential staff and include them in project leadership roles.
- Establish a structured handoff plan for key leadership functions.
- Collaborate with HR on internal leadership pipelines.



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**Collaboration**

- Case managers work across silos—nursing, finance, social work, medicine.
- Collaboration drives discharge efficiency and quality.
- Model respect and shared ownership.

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**Development Strategies**

- Attend interdisciplinary rounds and observe collaboration dynamics.
- Use structured communication tools (e.g., TeamSTEPPS, SBAR).
- Facilitate cross-departmental improvement initiatives.
- Conduct team reflection exercises to strengthen cohesion.



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**Advocacy**

- Advocate for patient access and equity.
- Advocate for staff resources and recognition.
- Advocate for the value of case management at all levels.

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## Development Strategies

- Study advocacy frameworks (e.g., IHI's *Triple Aim* and CMSA's *Advocacy Standard*).
- Participate in legislative engagement (local ANA/NASW chapters, CMSA Public Policy Committee).
- Learn persuasive communication and negotiation techniques.
- Attend board or committee meetings to observe advocacy in action.



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## Data Mastery

- Know your metrics (LOS, readmissions, avoidable days).
- Interpret trends and translate into action.
- Present data visually and narratively for leadership impact.

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## Development Strategies

- Develop Excel, Tableau, or Power BI proficiency for data visualization.
- Take courses in *Healthcare Analytics* or *Data Storytelling*.
- Learn how to build a balanced dashboard with key case management metrics.
- Partner with data analysts to understand data sources and validation.



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**Adaptability**

- Anticipate change and respond strategically.
- Stay calm and solution-focused during uncertainty.
- Flex your leadership style as the environment evolves.
- Thrive in Change

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**Development Strategies**

- Practice scenario planning and contingency mapping.
- Participate in change management training.
- Engage in reflective practice: debrief what worked and what didn't after change initiatives.
- Develop a personal resilience plan including self-care and boundary management.



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**INTEGRATION  
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APPLICATION**

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## Connecting the Essentials

- Leadership DNA
- All the skills are interconnected.



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## Case Study: Leading Through a Workflow Redesign

- Situation: LOS outliers and discharge delays.
- Leadership actions
  - Communication
  - Data mastery
  - Collaboration.
- Outcome: LOS ↓ 0.8 days; staff engagement ↑ 20%.



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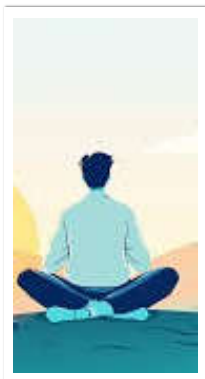
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## Reflection: Rate Yourself

- Rate yourself 1–5 on each essential.
- Which two are your strongest?
- Which one will you focus on improving?



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**Take It Forward: Application Challenge**

-  Choose one essential to apply intentionally this week.
-  Journal or debrief results with a colleague.
-  Share your learning with your team.

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**Questions**

- What resonated with you most?
- Which essential feels like the biggest opportunity area for your team or department?



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**Call to Action**

- Reflect on your own practice
- Choose one must-have to apply now
- Share learning & mentor others



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