

A silhouette of a person wearing a cowboy hat riding a horse, set against a vibrant sunset sky with orange and yellow clouds. The sun is low on the horizon, creating a strong backlight effect.

Riding Off Into the Sunset? A Trail Guide to Succession Planning

Participant Guide

ICAHN

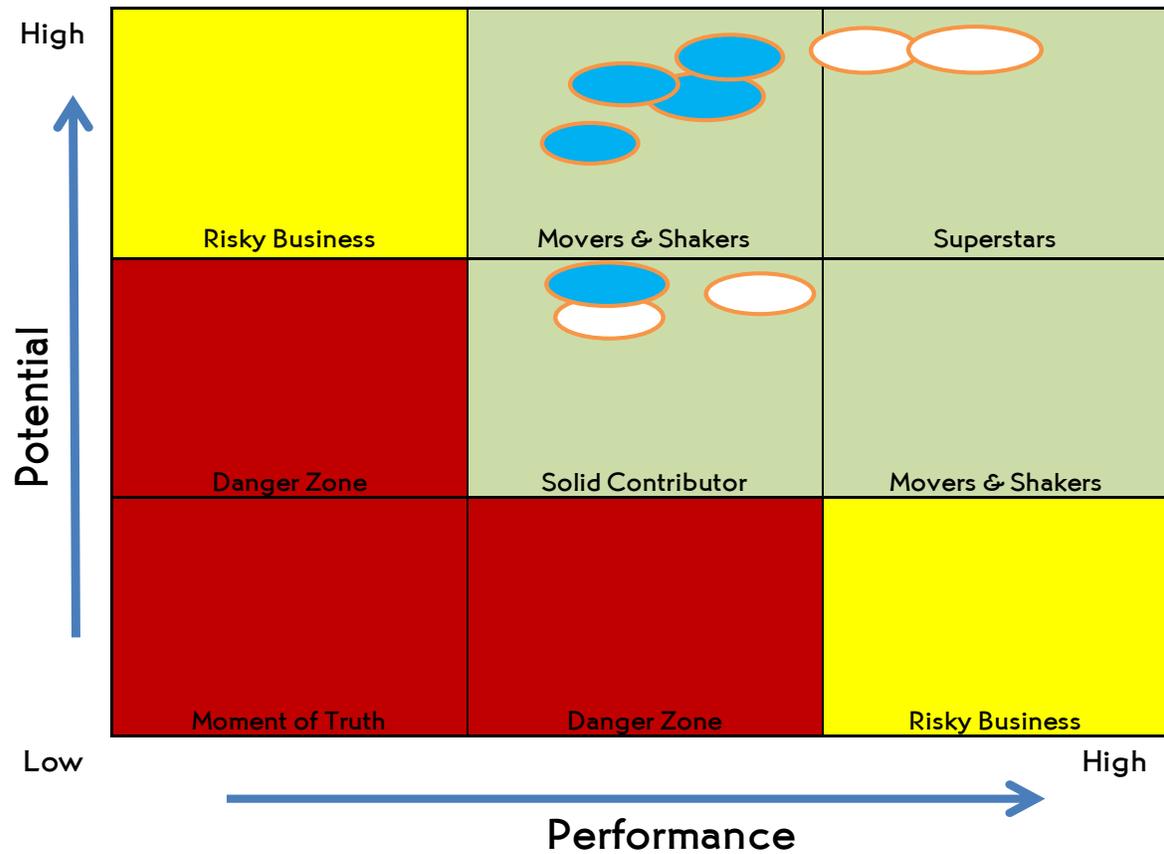
Fall Conference

November 15, 2017

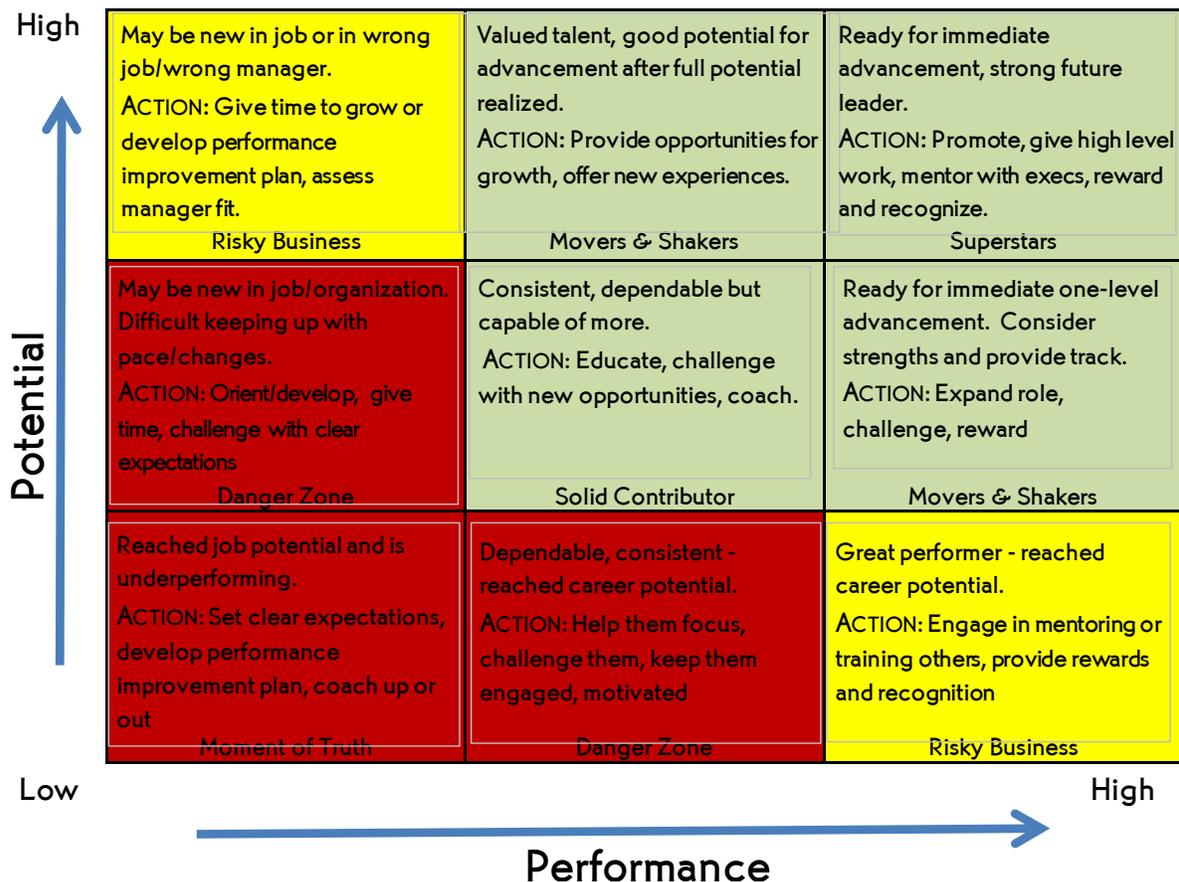
Presented by Tina Nazier, MBA, CPC

WIPFLi^{LLP}
CPAs and Consultants
HEALTH CARE PRACTICE

Health Care Talent and Succession Matrix



Matrix Definitions



Tina's Best Book List

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Leadership

1. **How to Identify and Master Change**, Robert Ian. Built on the premise that we already have the answer for how to overcome any challenge or problem in our lives, we just need to decode it. Quick read to inspire reaching beyond the comfort zone.
2. **Leading Strategic Change** – Breaking through the Brain Barrier, Black and Gregersen. Premise is to change the organization; we first need to change as individuals. Identifies the three brain barriers (failure to see, failure to move, and failure to finish) and provides tools for how to overcome.
3. **Hardwiring Excellence**, Quint Studer. Well-known health care change agent focused on changing culture in an organization.
4. **Results that Last**, Quint Studer. This book is specifically about hardwiring behaviors to ensure organizational success.
5. **Don't Kill the Messenger**, Kathryn Jeffers. Fun quick booklet that provides good tips for how to manage workplace conflict. Also outlines the 13 dangers in addressing workplace conflict and how to overcome them. Part of the Breaking the Rules series.
6. **The Five Dysfunctions of Team**, Patrick Lencioni. Absolutely the best team dysfunction book I have read! Written in a fable so it's light, fun and very insightful on why teams fail and how to overcome this. This should be required reading for any leadership team.
7. **Overcoming the Five Dysfunctions of Team**, Patrick Lencioni. Now the workbook on how to overcome the Five Dysfunctions of Team – I am in heaven with this one! I am definitely using these concepts in coaching teams and individuals!
8. **Reengineering Management**, James Champy. Sequel to Reengineering the Corporation – the science of reengineering. Provides simple guidelines to lead, organize, inspire, deploy, measure, and reward in a reengineered organization.
9. **The New Strategic Selling**, Heiman, Sanchez. A collection of personal management tools and processes to be more successful at closing the sale. Research in 100s of world renowned companies adds to the credibility of this approach.
10. **Execution, The Discipline of Getting Things Done**, Bossidy and Charan. Bossidy was the CEO that turned around General Electric. His disciplined approach around execution was critical to the organization's success. He talks about understanding how to link together people, strategy, and operations – the three core processes of every business. Many organizations fail because they have execution attention deficit disorder.

Strategy

1. **Good Profit**, Charles Koch. Good overview of how the Koch brothers achieved success in their diverse organization through a system of “Market-Based Management” to generate more “good profit”. The Cost, Price, Value (CPV) triangle was enlightening!
2. **The Balanced Scorecard**, Kaplan and Norton. Foundational resource for developing strategy that incorporates a balanced approach taking into account all aspects of strategy (financial, customer, Internal processes, and learning and growth). Discusses the five management principles to becoming “strategy focused”, and measuring/managing strategy.
3. **Strategy Maps**, Kaplan and Norton. Explains the importance of being able to visually tell the story of your strategy. Defines the process to develop effective strategy maps.
4. **Balanced Scorecard Step by Step**, Paul Niven. Further defines the creation of a balanced scorecard strategy in a little different way than Kaplan and Norton.
5. **Balanced Scorecard Diagnostics**, Paul Niven. Another good strategy tool that defines developing, training, assessing, and personalizing your balanced scorecard.
6. **Strategic Performance Management**, Bernard Marr. Shares the concepts of clarifying strategic purpose, values, and goals and how to manage performance related to this.

Personal Effectiveness

1. **Crucial Conversations**, Patterson, Grenny, et al. Probably the best personal effectiveness “core foundation skill building” book I’ve read. I apply this in everything I do personally and professionally! Provides a skill-based approach for how to hold any conversation well. Excellent CD series available also. I have listened to the CDs more than a dozen times in the past 10 years and have picked up a new thought every time.
2. **Crucial Confrontations**, Patterson, Grenny, et al. Next level of Crucial Conversations that provides the framework for holding others accountable for results after crucial conversations have occurred. CD series also available. Great for resolving ongoing, consistent performance issues.
3. **Influencer**, Patterson, Grenny, et al. Another great read from the authors of Crucial Conversations and Confrontations that uses concepts of both of these books and takes it to the next level of applying them into the “Six Source Influence Model”. This is a “must read” for anyone trying to figure out how to get better results (or why you seem permanently stuck in anything). A step by step skill based approach to using all sources of influence – not just personal knowledge or skill. Discusses importance of how to bring the social and environmental forces together with personal skill and will to create a dynamic plan to get better results. I use this constantly in leadership coaching!
4. **Change Anything**, Patterson, Grenny, et al. Takes the concept of the “Six Source Influence Model” and teaches practical application to five major change efforts many of us would like to be better at: career progression, weight loss, financial fitness, addictions, relationships, and finally – if you have any energy left after covering all of these – yes – they will help you “change the world😊”. Outstanding read that goes quickly if you’ve read and understand the “Six Source Influence Model”.

5. **Leadership and Self Deception**, The Arbinger Institute. Delightful tale of how we start with ourselves to develop some “out of the box” thinking on why we aren’t successful in our leadership efforts (a great personal effectiveness tool also!) Some similar concepts to Crucial Conversations.
6. **The Anatomy of Peace**, The Arbinger Institute. Another great tale that takes the “out of the box” experience to a very personal level. It shifts thinking from focusing on what’s going wrong to helping things go right.
7. **The Outward Mindset, Seeing Beyond Ourselves**, The Arbinger Institute. This book is the next in the series from the Arbinger Institute that focuses on how to move from a limited, self-focused inward mindset to really seeing and doing what’s best for others.
8. **Rock the Boat: How to Use Conflict to Heal and Deepen Your Relationships**, Resmaa Menakem, MSW, LICSW. Some of the best – very direct - relationship advice I’ve read! A very down to earth and matter of fact author that focuses on using conflict (not avoiding it) to create an emotional transformation that results in a greater, more mature intimacy; a deeper trust; and a stronger bond. And it all starts with me. A must read for any relationship!
9. **Co-Active Coaching**, Kimsey-House. The latest in coaching techniques to transform organizations in professional business environments.
10. **Happiness is an Inside Job**, Sylvia Boorstein. The responsibility of staying engaged in life and keeping ourselves happy is ours. The concept of equanimity struck a chord with me.
11. **Personal Styles and Effective Performance**, Merrill and Reid. Basic concepts of why we behave the way we do and how to harness the power of behaviors to create successful relationships and outcomes. Nice precursor to understanding our Predictive Index profiling concepts.
12. **The Five Love Languages**, Dr. Gary Chapman. Had to throw this book in even though it’s a personal relationship book (although we all know personal relationships impact our professional lives). Excellent book that clearly defines what love language each of us needs to feel fulfilled. Takes all of the confusion out of how to show love to others in a way that they want to receive it - genius. Simple concepts I wish someone would have defined for me when I was first in a relationship! It’s great for singles, married couples, kids, anyone. I love the assessment at the end that helped me and my spouse determine our own love languages (and also used it for my kids and their significant others - amazing). If you’re in a relationship, read it with your significant other. I laughed my way through parts of it as I realized how I could have put myself in any one of the scenarios. Simple, insightful, fun!
13. **The Five Languages of Apology**, Dr. Gary Chapman. Yet another book with five easy concepts to help us be more effective in our relationships – personal and professional. Why do some think our apologies are superficial or insincere? This book has the answer. Great resource to use in any setting.
14. **Getting to Yes: Negotiating Agreement Without Giving In**, Fisher and Ury. Both authors are Harvard professors – Fisher teaches negotiation at Harvard Law School and Ury is the Associate Director of Harvard Negotiation Project. Light, quick, easy read that has a similar take on the Crucial Conversations skills but also goes into how to get through when someone pulls rank on you, when they pull dirty tricks, and to get folks playing when they don’t want to play. This was required reading for all leaders at Mayo.

15. **The Seven Habits of Highly Effective People**, Stephen Covey. Covey is an icon in the world of personal and professional effectiveness. This is his primary foundational book that shares the concepts around how to take control of your life to improve effectiveness and experience greater fulfillment. This was required reading and competency based training for Mayo leaders.
16. **The 8th Habit**, Steven Covey. Fifteen years after his Seven Habits book was published, Covey felt the need to apply it to current life issues. In the “knowledge worker” age, we no longer can settle for just effectiveness. We need to move to greatness – new mindset, new skill set, new tool set to achieve greatness.
17. **The Untethered Soul; The Journey Beyond Yourself**, Michael A Singer. A compelling book that gets to the depths of your soul, who you are, and how you can truly free yourself from your internal psyche in order to find happiness and peace beyond your boundaries. Excellent, deep, insightful, inspiring read! For those who have not explored the self and psyche, it’s a bit complex. I had to re-read a few sections to completely understand the concept but well worth the effort. Inspiring and freeing!
18. **Who Moved My Cheese**, Spencer Johnson, M.D. Simple, short, fun, parable that addresses what we want in life (the cheese) and how to navigate the maze to get it. Good book for helping deal with change to have less stress and more success in your personal and professional life.