

Development

1. Leading Teams

Strong leadership is the backbone of any thriving medical clinic.

1.1. What is means to lead a Team

Leadership is the process of directing and motivating a group or an individual to attain a common objective. Leaders inspire people to take steps toward achieving success.

Leaders and teams may come in different shapes and sizes. Leaders can differ greatly in terms of leadership styles. Despite many potential differences, the primary factors of leadership remain stable. It is important to apply good communication skills, foster a supportive working environment, and celebrate success.

1.2. Five Dysfunctions of a Team

A commonly used theory that examines why effective teams are so rare and provides specific recommendations for eliminating 5 large barriers that lead to dysfunctional teams.



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2. Evaluating Performance

2.1. Probation Period

During the employee's probation period, the employer can see if the person, they hired is a good fit for the position and company. It allows the employer and the employee to understand each other's needs and expectations.

During this period, both parties may be exempt from some contractual obligations. (E.g. the employer may be able to end their employment with short notice or no notice at all regardless of the cause).

It is common for employers to give their new full-time employees a period of three to six months.	Managers use the probationary period to test if the company's new hires are capable of successfully completing their tasks and are as qualified as they presented themselves throughout the application process.	It is an important period because it offers employers and their new employees more flexibility.
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2.2. What happens after a probation period ends?

The day following the end date of the employee's probationary period, the employers' full obligations of your contract come into effect, including your notice period. If the employer withheld certain benefits during the probation period, the employee would now become entitled to them.

At the end of the probationary period, a review meeting is typically held to discuss the employee's performance and progress. Based on the employee's progress, the next steps typically include:

Regular Employment	Extension of the probation period to further assess their suitability	Termination of Employment
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2.3. Employee Performance Management

Performance Management is the process leaders use to measure, develop, and motivate the employee and their performance. The process should be ongoing. With continuous performance management, you can empower and engage employees to drive goals and objectives critical to business success.

Your approach to performance makes all the difference in the employee experience.

Address obstacles and opportunities as they come up.

Proactively identifying and addressing performance issues will help prevent issues from escalating. Concerns should be addressed in a timely manner, rather than waiting for a previously scheduled review to quickly resolve the conflict.

Make employees feel heard, valued, and recognized

Engage employees by having continuous conversations around performance and development, provide real time recognition when an employee's work contributes to business success, set goals together, exchange regular feedback. When employees are active participants, they feel a stronger sense of voice and influence, further influencing their dedication and motivation to excel.

Organizational Goals and Purpose

Having clear and aligned goals helps the employee understand how their daily initiatives make an impact. They feel more connected to their work and its purpose.

Promote employee growth and development

Help employees reach their full potential. Address skill gaps, outline growth opportunities, and bolster employee strengths. It helps employees feel like the organization is invested in their development and career growth.

Support a Healthy Company Culture

When you coach employees in a way that motivates and engages them, with ongoing feedback, recognition, and goal alignment, you'll foster a culture that employees can thrive in.

3. Feedback

Providing your employees with regular feedback through informal conversations and annual performance reviews is **important**. Within the workplace, by creating an environment where regular feedback (positive and constructive) happens on a regular basis, you are creating an environment where open **communication** is the norm and is encouraged.

3.1. Types of Employee feedback:

Positive Feedback	Constructive Feedback
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3.2. How to normalize feedback?

- Talk about it before ever having to give it.
- Ask for and receive it well.
- Establish a foundation of positive feedback.
- Be genuine and show the employee that you have their best interest at heart.

Description of framework below can be used:

1.	Allow for self-evaluation <i>“Can we talk about... How do you think it has gone?”</i>
2.	Describe what happened <i>“In the past X weeks, I have noticed that ... Does that sound right?”</i>
3.	Share the Impact <i>“When ... happens, I feel that we are not ... What’s your take on it?”</i>
4.	Explain how it met or did not meet the expectation <i>“When ... happens, I feel that ... What’s your take on it?”</i>
5.	Closing <i>“What can I do to help or provide support?”</i>

3.3. Benefits of normalizing regular feedback

Trust	Psychological Safety	Employee Engagement	Improved Performance
Culture of Communication	Better Relationships	Enhance Employee Recognition	

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4. Check In & Touchpoints

One vital aspect of every employee experience is touchpoints. They benefit the employer, the employee, and the overall medical clinic in vastly different ways. It is a time set aside for the employee where they can give feedback, problem solve, and/or connect based on what they need.



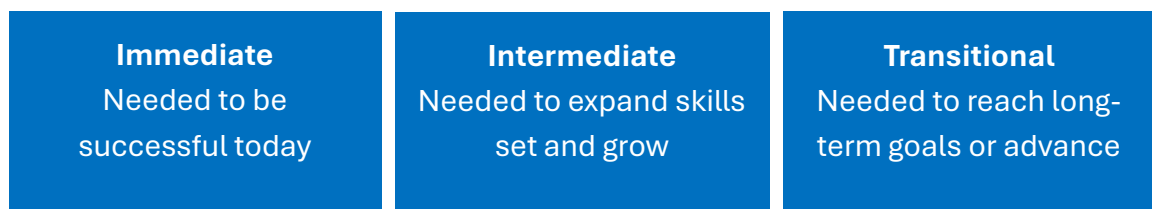
5. Continuous Education, Learning, and Training

Continuous learning is the ongoing expansion of knowledge and skill sets. It's about developing new skills and knowledge, while also reinforcing what has been previously learned. Because a medical clinic's success depends on its people, it's important for employee skill sets to evolve to meet the demands of the practice and continuous learning is one way to achieve that.

5.1. Continuous learning benefits:

- Achievement of career development goals.
- Obtain/update professional licenses or certifications.
- Explore new opportunities and perspectives in their work and personal development.
- Develop professional skills.
- Encourage forward-thinking.
- Contribute to achieving organizational goals.
- Make employees feel valued.
- Keep cost down as it is less expensive to invest in the ongoing development of current employees than to train new employees.

5.2. Continuous Learning Breakdown



6. Implementing Change

Helping your business grow and thrive often requires implementing change. Implementing changes could fall within one or more of the following categories.

Shifting the way,
you do business
in some way

New Business
Strategy

Updated or New
Employee
Practices

Implementation
of a new software
or equipment

It is important to know that implementing change effectively requires change management, which is a process that helps employees prepare for an organizational transition using various resources and strategies.

6.1. Minimize the Resistance

Change can be difficult and uncomfortable for employees; however, implementing a unified change management process ensures that everyone involved is aware of the reasons why changes are necessary.

It is recommended that you develop a plan that will gain employee buy-in and provide them with the necessary tools to achieve the intended change.

Leadership plays a crucial role in change implementation.

6.2. What is the goal of change implementation?

Typically, change implementation occurs when the clinic management wants to achieve greater efficiency to meet business goals or to adjust processes for new goals.

6.3. What are the benefits of change implementation?

Improving collaboration or cooperation within the business	Improving employee productivity, engagement and morale	Improving the efficiency of work processes
Adapting or responding to changes more efficiently	Reducing cost	Providing a path to achieve specific business objectives

6.4. How to start Implementing Changes?

Our Practice Support Team can help you and your team with tools, resources, and guide you through implementing changes within your workplace.

7. Retention Management

The **employee experience** is a key indicator of whether your employees decide to leave or not. The employee experience begins during hiring and continues throughout onboarding. After onboarding, employees enter the engagement, growth and development, and retention phase, where various factors influence their engagement.

Retention Management should ideally be seen as a **proactive approach** versus a reactive approach to retaining employees.

7.1. Employee retention strategies for job satisfaction:

Onboarding & Orientation	Mentorship programs	Employee Compensation
Perks	Wellness Offerings	Communication
Continuous feedback including recognition	Training and Development	Work life balance
Flexible work arrangements	Effective change management	Acknowledgement of milestones, big and small

7.2. Why is retention important?

The time, effort, and cost spent on recruitment, interviewing, and training new employees can be avoided if you focus on retaining existing employees. High retention reduces lost knowledge, missed revenue opportunities, and hiring expenses.

Resigning and replacing an employee generally costs between 25%-250% of their annual salary depending on the level of knowledge required for the position.

7.3. Why do employees leave?

Exit interviews can provide invaluable insight into the employee perspective.

8. Coaching and Performance Improvement

This guide was built with the intention of providing you with the tools to create an individualized, action-oriented, step-by-step plan to improve the performance of employees who are:

Not meeting their performance expectations at work.

Would benefit from a structured improvement plan.

8.1. What is a Coaching & Performance Improvement Plan?

Helps the employee understand their skills.

Helps to identify training gaps.

Helps to set clear expectations.

Identifies timelines for improvement and follow up.

Identifies actionable steps.

It is important to note that if implemented correctly, this can be a positive tool to align management and employees, improve job performance, and increase job satisfaction.

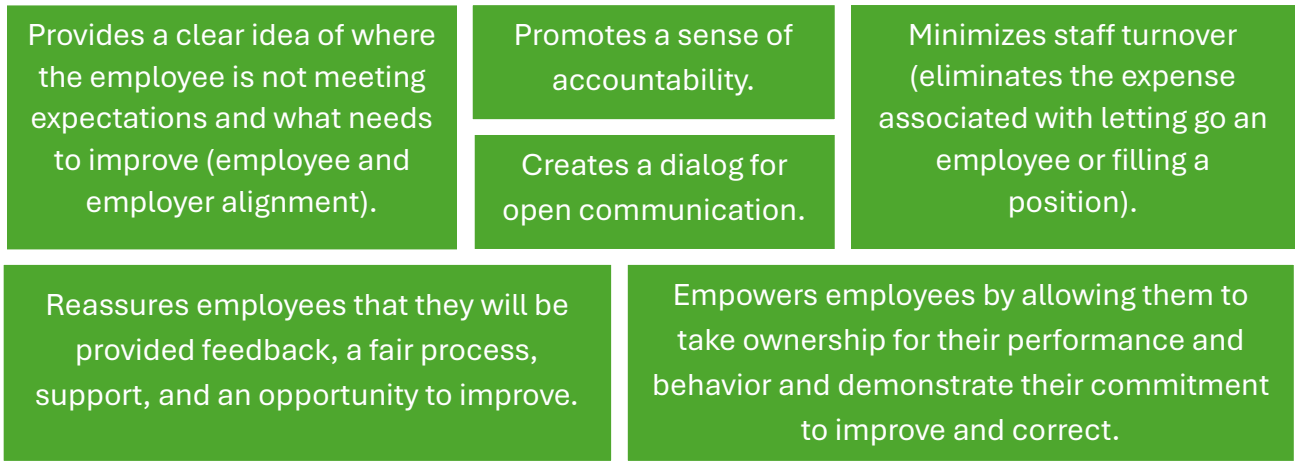
Each plan is unique to the needs of an employee and documentation is VERY important.

The creation and implementation of a Performance Improvement Plan will take time, reflection, and preparation. It is to be used when there is a genuine interest and belief that the employee's performance will improve.

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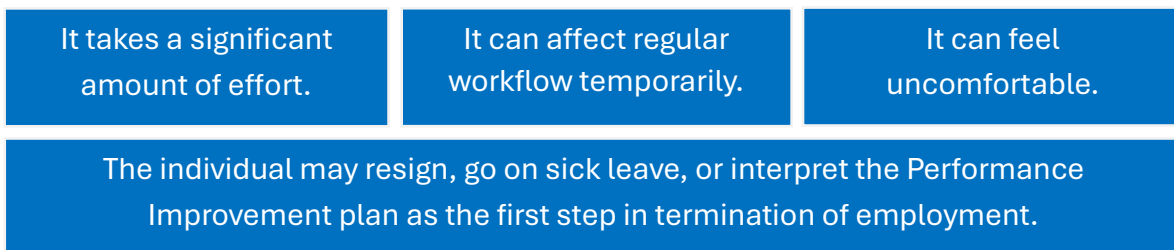
8.2. Benefits and Advantages

Listed below are some benefits in implementing a Performance Improvement Plan.



8.3. Risks and Disadvantages

The implementation of a Performance Improvement Plan can also lead to **disadvantages and risks**, listed below are some factors to take into consideration.



9. Initiating a Performance Improvement Plan

The steps below will walk you through the process of implementing a Performance Improvement Plan (PIP).

9.1. Employer Reflection

It is very important that the employer first determines and defines the definition of an acceptable performance.

- Determine what is your acceptable performance criteria within this specific role and compare this to what you are currently seeing from your employee.
- Be specific and identify examples of behaviours and performance issues.

9.2. It all starts with a conversation

A formal PIP should not be implemented without an initial performance management conversation.

- Have a serious conversation with the employee.
- Identify challenges and expectations not being fully met.
- Identify temporary improvements (if applicable).
- Identify patterns (if applicable).
- Identify the negative impacts (Performance/Behavior).
- Identify your role expectations.
- Identify that you need to see sustained, permanent improvement.
- Identify next steps (Follow up Meeting and Written Performance Improvement Plan with actions and timeframe).

Within the initial conversation, all parties should have the chance to provide input. You want to create an environment of open conversation; therefore, provide the employee with the opportunity to share their thoughts. You want the employee to feel engaged and committed to meeting targets. You can achieve this by expressing your genuine interest and belief that you are willing to invest the time and effort to help them achieve success.

After the initial conversation, it is recommended to provide the employee with time to absorb, reflect, and re-group their thoughts; therefore, it is recommended to immediately book a follow-up meeting within a short time frame (2-3 days) to allow the employee to discuss and share what they self-identify to require to be successful.

You may want to provide the employee with key questions for the follow-up meeting to help them prepare, for example:

- Can you reflect on what you need to be successful (e.g. Training, Coaching, or Additional Resources)?
- Can you identify what are your biggest challenges and why?
- Can you identify what you are prepared to do to improve (Performance/Behavior)?

- Can you identify how I (the employer) can best support you in achieving success.

9.3. Performance Improvement Plan (PIP)

Once the initial conversation/follow up has been completed, the employer may choose to implement a written Performance Improvement Plan shortly after to define a plan that clearly states:

1. Identify Problems	2. Employer expectations	3. An action plan
List problem areas and include possible root cause.	Role/Team expectations within the company.	How the team member can improve, including goals to achieve.
4. Pre-determined touchpoints	5. Set an improvement timeline	6. Define Consequences of inaction
Set a follow-up schedule and pre-scheduled check-ins.	End or Renewal of Performance Improvement Plan (specific date).	Explain what could happen if a team member does not follow through.

The PIP Should be a co-created plan of action based on mutually agreed objectives. All Performance Improvement Plans should be dated and signed by the Employer/Leader and the employee acknowledging that they both understand and agree with the terms in the PIP.

- 📌 Please refer to *Performance Improvement Plan* Template.
- 📌 Please refer to *Progress Assessment* Template.

For any actions regarding changes to an employee’s employment, it is recommended to consult an Employment Lawyer or a Chartered Professional in Human Resources to ensure you are compliant with legislation.

Helpful Resources

Creating a Culture of Feedback	Link
Civil Service Act	Link
Notice of Dismissal, Layoff or Termination, NB	Link