

# Develop key skills to make the move to management

You've worked hard and risen through the ranks in your revenue integrity team—but now you might be wondering what's next. For a revenue integrity professional focused on growth and excellence, the logical step might be to throw your hat in the ring for a management position. But before you take a leap into the unknown, take a moment to reflect on your goals and skills and consider how

they line up with the reality of being a manager.

Stepping into a management role isn't so much a promotion as it is a career change, a February 2019 *Fast Company* [article](#) pointed out. Although the knowledge and skills you've amassed will still be valuable, you'll need a different suite of competencies to be effective in your new role.

There are a lot of perks to joining the ranks of management—higher

salary and the chance to shine as a leader are attractive to most people—but jumping in before you're ready will set you further back. Take the time to work on your skills and find opportunities to demonstrate to your own managers that you have what it takes.

## Tough questions

Being a manager means answering tough questions, and you can start by asking yourself the



biggest one: How do you know that you're ready to be a manager?

The truth is, you often don't know until you try, says **Stacey McCreery, MBA**, founder and president of ROI Search Group in Fishers, Indiana.

"It's always important to try different opportunities or to take on different components of leadership, and that often opens the door to management," she says. "Until you actually do that, you may not even know that you want to pursue a leadership opportunity."

and although that's understandable, it cuts you off from valuable experiences and connections.

In addition, know your limitations and be vulnerable to expose them, says **Nicole D. Harper, PhD**, director of revenue cycle improvement at Eskenazi Health in Indianapolis.

By being aware of areas you need to grow in, you can search for projects and opportunities that will build your expertise and strengthen your ability to contribute at a high level, she adds.

You can also ask exemplary leaders, in your department or another, if you can shadow them, McCreery says. Seeing a great leader in action can be highly educational, and it will give you a better perspective on what the day-to-day of management is like.

"That's a great way to get yourself in the door and have people say, 'Wow, that person really wants to learn.' If you've never been a leader before, it's really important to see people who are great leaders," she says.

## Mentors matter

Everyone agrees that finding a mentor or mentors will give you a leg up. But how do you find the right person to guide your career? And how do you approach a potential mentor? Just ask, McCreery recommends. Most people will be flattered to serve as a role model and will be happy to pay forward the benefits they derived from working with their own mentors, she says. So, don't be shy: Even if the person you reach out to isn't able to act as a mentor to you, he or she might be able to recommend someone else. And taking the initiative to ask, then accept the outcome, is good practice for being a manager.

"People will make time for you. I'm always flattered when people make time for me, and you learn a lot from them," McCreery says. "My mentors have always said to me, 'Someday, when you're



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Volunteering to lead projects and teams or stepping up to train your peers and new hires will give you a glimpse of a manager's role and showcase your leadership capabilities. Without doing those things, people won't be able to see you as management material, McCreery points out. If you've never been a manager or in a visible leadership role, it will be difficult for managers and directors to promote you. You might be reluctant to assume aspects of management without receiving a change in title or compensation,

"I always tell folks that I'm meeting with they need to be looking outside the scope of their role," McCreery says. "And what I mean by that is if someday you would like to be a manager, you absolutely need to be working as a manager before you are a manager."

This can be as simple as offering to cover for a manager who's out on leave. It could also be volunteering for a tough project that's scared off other staff—a move that can teach you a lot and get you noticed.

## SEVEN TIPS FOR REVENUE INTEGRITY PROFESSIONALS MOVING INTO MANAGEMENT

For a revenue integrity professional exploring a management opportunity, there's a lot to learn. Keep the following tips from **Stacey McCreery, MBA**, founder and president of ROI Search in Fishers, Indiana, and **Nicole D. Harper, PhD**, director of revenue cycle improvement at Eskenazi Health in Indianapolis, in mind as you lay the groundwork for your career move:

- 1. Maximize mentors.** Even if your favorite manager has agreed to be your mentor, don't stop there, McCreery cautions. "Make sure you have two to three mentors," she says. "Don't rely on one person, because each mentor will give you a different flavor; each person does things differently."
  - 2. Hustle harder.** There's no easing into management. Be prepared to work harder than you've ever worked, according to McCreery. But always keep in mind that the payoff will be worth it.
  - 3. Delegate well.** Most people aren't good at delegating. As a new manager, it can be a challenge to learn to let go of tasks that have been part of your professional identity. But hanging onto the past will hurt you and your team. It'll clutter up your schedule, prevent you from giving your full attention to your managerial duties, and cut your team off from learning opportunities. On the flip side, delegating isn't about being a taskmaster; it's about being a mentor and a teacher. "Half of your time should be teaching your staff how to do things that you used to do and delegating to them," McCreery says. "It's easy when they don't know how to do it for you to do it on your own, but then you're not going to
- teach them how to do it and you're not going to be effective."
- 4. Honor commitments.** Managers new and old can find themselves overwhelmed with meetings and looking to cut back. Although it might seem easy to skip meetings with your team—after all, they know how to reach you and might work with you every day—they're the last people you should bump from your schedule. Team meetings and one-on-ones give you and your staff the opportunity to have real conversations, get to the bottom of immediate challenges, and discuss long-term goals and planning. These are conversations that are difficult to have on the fly. Keeping those meetings on the books lets your team know that you value and respect them. "The investment you make with your own team members is incredibly important," McCreery says.
  - 5. Don't leave empty chairs at the table.** If you have a vacant position, make sure it's filled as soon as possible by the right person. Filling that position should be your number one priority, McCreery says. "When you don't, somebody's got to get the work done; you're divvying up all the work in addition to their normal responsibilities," she explains. "So that's weighing on your staff."
  - 6. Come clean.** As a manager, you'll probably hear bad news before other staff members. Perhaps a beloved department director is leaving. Maybe a restructuring will break up close-knit teams. Or maybe the organization will be switching EHRs in six months. There are times when you won't be able to share

news immediately, but once you get the green light to speak to your staff, do it—stat. When changes are afoot, word will get out. Your team will want to hear bad news from you, not through the grapevine. By being up front, you'll limit rumors and may be able to help your team find the silver lining. "No matter what is going on in the department, make sure that transparency and communication is there," McCreery says. "Even the bad news, it's so important to share that with your staff. Before they hear it from anyone else, they need to hear it from you."

**7. Be present.** You'll have many priorities and expectations as a manager. While all of

them are important, always remember the most crucial part of the process: the people responsible for helping you accomplish your goals. "No one person can be truly successful completely on their own. As such, make sure you take the time to show up for your team; listen to their ideas and input where possible," Harper says. "Bring their visions to life, let them be an active part of solutions, and focus on feedback and encouragement and/or constructive criticism to help them to grow. When you invest in their future and their success, they will invest in you. After all, there's no such thing as a leader who has no followers." **NJ**

where I am, make sure you do the same,' and I always do that now. Someday, if you're where I am, make sure you give back."

Mentoring is a two-way street, McCreery points out. The mentor and the mentee learn from each other—and there's no expiration date on the relationship. Even after you land your first management position, you can still turn to your mentors for advice and support. McCreery says she's still in touch with some of her first mentors and continues to learn from them.

Be candid with your mentors about your goals and expectations, what motivates you, and what holds you back. Take their advice and guidance with an open mind, and don't put it aside once you've reached your goal. The advice you get from mentors

can often be applied to your entire career, not just that one big leap.

"Try not to limit yourself to only one mentor. Different professionals may be able to provide multiple perspectives, helping you deepen the breadth of your learning," Harper advises. "Ask the same question of multiple professionals, listen to the myriad of responses, and use that knowledge to create a custom plan specific to what works best for you."

## Smart learning

When you start comparing yourself to managers, you might be intimidated by their list of credentials and educational achievements. Keep in mind, though, that many of these credentials, certificates, and degrees have been accumulated over the course of their career. Not everyone steps

into management with an MBA—or even needs to. But how do you know where to start? What's the industry standard for your goal?

To find out, ask your colleagues who are already in the types of management roles that you have your eye on, McCreery recommends. If you're looking to move from senior revenue integrity analyst to revenue integrity manager, talk to managers or directors in your department about the credentials that are most important to their work. A revenue integrity director might have earned 10 credentials over his or her career, but only possess two or three that are key to his or her current role.

Don't forget to get the scoop on professional associations, McCreery adds. All those credentials might be from varying

associations. While it's tempting to join as many as possible to absorb more information, you need to invest your time and resources wisely. After all, that's what a manager would do.

"You can have so many associations that you're focusing on that you can't do justice to all of them," she says. "And then you miss out on the really good ones."

Perhaps earlier in your career you joined a few associations that were relevant to your role at the time, but now you're focusing your growth on revenue integrity. Get honest feedback from revenue integrity leaders on what they find valuable, then prioritize the associations and credentials that directly relate to your work.

Look through what's available and collect as much information as you can to smartly decide where to spend your networking time, Harper advises. "When you get all those details together, synthesize the data into an actionable plan that will result in the best learning and advancement for you," she explains.

## The right stuff

You may already have the hard skills you need for a new role in management. You know revenue integrity inside and out. You've taken some classes to shore up your budgeting skills and other technical know-how. But as everyone knows, there's a lot more



to being a good manager than putting the department's budget in a spreadsheet—you'll also need soft skills. These can be more challenging to develop than technical skills, but you can build them up by being focused and thoughtful.

So, what soft skills are the most important for a manager? According to McCreery, good leaders need to be strong communicators, transparent, and confident.

Many people might think their communication skills are top-notch, but there's a big difference between how a staff member communicates and how a manager is expected to communicate. True, a manager needs to know how to ask the right questions in the right way; a single question should ask both the what and the why to encourage answers that are complete and thoughtful, wrote **Julie Teixeira**, senior client consultant for ROI Search Group, in the [October 2019 issue](#) of the *NAHRI Journal*. But

communicating isn't just about talking—it's about listening and creating an atmosphere that allows people to feel comfortable being honest even when the topic is difficult.

"You're going to have to communicate well with your staff. You're going to have to master that," McCreery says. "If you can't communicate well, you're not going to be a great manager. That sounds pretty harsh, but you've got to do a good job."

Transparency is almost a buzzword, but its value is real. Although not every piece of news can be shared with the whole team, holding back information or being not quite honest will damage a manager's reputation. Transparency is about mutual trust and respect. Most people can look back on a time when they worked with a manager they didn't trust and respect and who didn't trust and respect them. That's not the kind of culture you want to create—even when being transparent is difficult, according to McCreery.

Many managers might be tempted to be less than transparent when they want to avoid an awkward conversation, McCreery explains. For example, say a position opens up and an existing staff member whom you know isn't qualified asks to be interviewed for the position. If you put him or her off with an excuse, you're not being transparent. You're also hindering that staffer's growth.

"You should interview that person internally that's not qualified, and here's why: It's an open opportunity to have a conversation with them to find out what's important to them," McCreery says. "It's also an opportunity to let them know, 'Here are the requirements of the position, and you don't meet the requirements.' "

If your instinct is to avoid the conversation, then you're not being a good communicator and you're not being transparent. And that means you've missed two out of three of the essential skills.

"You must be transparent and you must communicate," McCreery points out. "Those skills are critical for your success. If you can't do those things, you're not going to lead your team well."

And that ties into the final and often most challenging skill: confidence. As a manager, you'll have to make difficult decisions, cast the deciding vote, handle conflict, and deliver unpleasant news. To get through those situations,

you need to be confident. It's a tough skill to master, according to McCreery, and many leaders, even CEOs, struggle with it.

There's no quick way to become more confident, McCreery says—it just takes hard work. You must invest more time in person-

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al development and learn how to push back against fear and believe in yourself, she explains.

"If you don't do these three things—communicate well, be transparent, and be confident—then your staff is going to walk all over you," she says. "They're going to follow right in your footsteps, and they won't be these three things either. Your department can't afford that."

### Self-assessment

Now here's the hard part: Not everyone is cut out to be a manager. It's easy to want to be a manager, and it's easy for current managers to want to promote their star staff members to management. But just because you're a high performer in your current role doesn't mean you'll easily transition to management,

McCreery points out. And there's nothing wrong with that.

"It's OK to try management, but if it's not for you, that's OK. Not everyone should be a manager," she says. "And I think we all need to be OK with that. Everyone likes to make more money; that's

exciting—but then we see a bad outcome where the organization terminates them because they didn't do a good job."

That's why it's critical to try taking on management duties before leaping into a new role. You might be an innovator and a problem solver, but you may not thrive under the increased scrutiny that comes with being a manager. You might love efficiency, but you may struggle to find a purpose after you delegate core tasks to your team. That doesn't mean your career path has hit a dead end, though. Opportunities are everywhere for a talented revenue integrity professional. By focusing on what you truly want out of your career and leaning into your strengths, you'll never run out of options. **NJ**