



ALEX O' BRIEN POTENTIAL EXERCISE

NHS MODEL ANSWER

Alex O'Brien

Alex joined Mapletree Trust in 2007, and has successfully progressed up to Clinical Lead for Cardiology. She intends to be promoted to Divisional Director level in the next 12 months though she does have some concerns about being more management than clinically focused, missing patient contact and the impact on her work-life balance. However, she wants to progress up the ladder and feels this is the only option for her. The other issue is trying to balance patient needs with towing the “management line” e.g. cost cutting vs. investment in certain services– she has called out such contradictions in the past but wonders whether this maybe become increasingly difficult the more senior she is in the organisation. She is willing to move to a different Trust for a Divisional Director role, but wants to stay in the West London area. She has delivered strong results for the organisation throughout her time there and is meticulous in ensuring she continuously overachieves in whatever she is tasked with. She has been successful in exceeding target performance levels for both reducing harm, and increasing safety for this year. She has achieved this by carrying out a review of the Cardiology department to understand factors which influenced harm and safety levels. Her patient mortality ratings for her clinical caseload are amongst the lowest in the Trust. She enjoys undertaking continuous professional development to ensure she always maintains an in-depth and current understanding of medical research and adds to the profile of her department. For example, she recently designed a new process for measuring and monitoring clinical quality and shared the results of this approach at a recent inter Trust event and at the BCS Annual Conference.

Alex is particularly skilled in her interactions with her patients. She adapts a calm and respectful yet firm manner for which she has received positive patient feedback on multiple occasions, as well as the respect of many of her peers. She is comfortable making critical decisions when pressed for time given her previous experience in emergency situations, and tends to take a relatively intuitive approach. She thrives on stressful environments. She enjoys leading a team and sees herself as a visionary and strategic leader; skilled at inspiring and motivating others to perform to their highest ability. For example, she was one of the main instigators in the partnership between Mapletree Trust and its Clinical Commissioning Groups to establish new services resulting in the generation of additional revenue for the Trust. She has worked closely with the Communications function to support the creation of materials to support these new services.

Alex views herself as successful in all aspects of her professional career. She does not believe she has any particular areas of improvement, in that she reaches all her performance targets, receives positive feedback from patients, and has been very successful in gaining the career progression at Mapletree Trust she wanted. However Alex has been reported to HR on two occasions for harassment of her direct reports. Although there have been no actions taken as a result of this, it is important that no emerging issues continue to develop. When Alex's line manager and a member of the HR team spoke to her about these issues she reacted very defensively to their concern and *didn't seem to want to listen, directly stating that the individuals in question were not 'up to scratch'* and she was taking a 'tough love' approach to their continued development. Recently, there has been some anecdotal evidence of friction between her and the Operational Lead with respect to some new staff resourcing/headcount ideas aimed at improving the operational performance of the Cardiology department. Her line manager has mentioned this to her but Alex described the situation as a *“personality clash”*, and asked *“whether the Operational Lead had talked about her behind her back?”*. HR have also mentioned that they have chased Alex repeatedly for her succession plan for the department but she still has not provided it. When challenged on this she mentioned that she argued that no one in the team is ready to replace her. There has also been some feedback from the team that she has repeatedly cancelled knowledge sharing sessions that her direct reports had requested at the beginning of the year.

Talent Management Conversation Tool

Read and familiarise yourself with the following model using the [Talent Management Conversation Tool Guide](#)

<p>Readiness to move</p> <p>Performance and behaviours</p>	<p>Professional talent</p> <p>Shows promise to continue to advance in their professional field or into a wider leadership role within 3–5 years if they have the capacity and ambition to do so, but equally valuable where they are.</p>	<p>Developing talent, ready soon</p> <p>Demonstrates the potential, ambition and motivation to develop at their current level and potentially progress in their career within 1–3 years into new and wider challenges.</p>	<p>Ready now</p> <p>Demonstrates the potential, ambition, motivation and experience to perform at the next level now or within the next 12 months into new and wider challenges.</p>
<p>Exceeds expectations</p> <p>Outstanding performance against objectives, achieves more than what is expected of them, and demonstrates role modelling of behaviours required beyond their role.</p>	<p>Professional in field</p> <ul style="list-style-type: none"> • High performance in own field. • Role models behaviours of organisation/role. • Consistent results and brings added value to tasks given • Possible reached 'expert' stage in their career. • Shows upward potential, but less ambition, likely to move on in the medium future, outside of own specialism. • Emergent wider skills. 	<p>Key generalist (Pivotal and flexible)</p> <ul style="list-style-type: none"> • High performance with consistency of results across a variety of assignments and brings added value to tasks given. • Acts wider than professional background. • Role models behaviours of organisation/role. • Low-moderate potential/ambition to move on, possibly happy to stay in current position. • Secondary pool to fill critical positions; perhaps move one level; likely to shift to key of high professional roles over time. 	<p>Role model (High potential to go further)</p> <ul style="list-style-type: none"> • A role model with the highest levels of performance, potential and ambition to move on. • High performer, bringing added value to assignments with lots of potential and capacity for immediate advancement. • Role models behaviours of organisation/role. • Demonstrates mastery of current assignment. • True organisation asset – role model. • First call to fill critical positions.
<p>Meets expectations</p> <p>Meets the expectations for performance against objectives and behaviours required at the level for their role.</p>	<p>Future professional in field</p> <ul style="list-style-type: none"> • Good reliable performance. • Behaves professionally in line with role. • Showing upward potential but less ambitious to move outside of field. 	<p>Solid generalist (Solid/adaptable)</p> <ul style="list-style-type: none"> • Good rounded performance. • Behaves professionally in line with role. • Meets expectations. • Works wider than professional background. • Some potential to do more in long term if ambition and development allows. 	<p>Future emergent potential (Capacity for key roles)</p> <ul style="list-style-type: none"> • Individual with high potential. • Good rounded performance. • Behaves professionally in line with role. • Has the capacity to be a consistent talent, or with stretch move to higher levels.
<p>Partially met expectations</p> <p>Below 'met expectations' against performance objectives and behaviours required at the level for their role.</p>	<p>Developing professional (Needs stretching)</p> <ul style="list-style-type: none"> • Current low demonstration of performance and behaviours required of role. • Being supported to reach their potential. • May be in the wrong role. 	<p>Developing generalist (Needs stretching)</p> <ul style="list-style-type: none"> • Low performance but showing moderate potential over time outside of professional role. • Being supported, needs pushing and stretching to reach full potential. • May be bored, under-used or in the wrong role. 	<p>Transition employee (New to role, needs support)</p> <ul style="list-style-type: none"> • New to post or assignment. • Have yet to demonstrate results, or high potential in a new position / development assignment. • Future performance will allow assessment of where they align to the grid longer term.

Model Answer

Performance Rating – Behaviour ALEX O'BRIEN		
Behaviour	Notes	Rating Score/3 where 1; Partially meets, 2; Meets, 3; Exceeds expectations
Inspiring Shared Purpose	Has called out tensions between management perspectives and patient care. Is patient centric in her approach and looks for ways to improve the service – redesigned clinical outcome measurement.	3
Connecting our Service	Works well with the CCG to create new revenue opportunities. Collaborates well with internal and external stakeholders to drive opportunities. Has shared best practice across different Cardiology departments.	3
Engaging the team	Seems unreceptive to new ideas from the Operational Lead regarding staff resourcing. Seems quite harsh in her approach and unreceptive to feedback from her line manager/HR.	1
Developing capability	Is unwilling to put together her succession management plan. Does not believe that anyone in the team can replace her. Has a tendency to cancel knowledge sharing sessions which is affecting her team's development. Philosophy seems to focus on "tough love" and being very challenging towards colleagues rather than being supportive. Does focus on her own development and being familiar with industry developments.	2

Performance Rating – Behaviour

Behaviour Definitions

Inspiring Shared Purpose	<ul style="list-style-type: none">• Valuing a service ethos• Curious about how to improve services and patient care• Behaving in a way that reflects the principles and values of the NHS <p><i>Exemplary:</i> Making courageous challenges for the benefit of the service</p>
Connecting our Service	<p>Understanding how health and social care services fit together and how different people, teams or organisations interconnect and interact.</p> <p><i>Exemplary:</i> Working strategically across the system</p>
Engaging the team	<p>Involving individuals and demonstrating that their contributions and ideas are valued and important for delivering outcomes and continuous improvements to the service.</p> <p><i>Exemplary:</i> Stretching the team for excellence and innovation</p>
Developing capability	<ul style="list-style-type: none">• Building capability to enable people to meet future challenges• Using a range of experiences as a vehicle for individual and organisational learning• Acting a role model for personal development <p><i>Exemplary:</i> Creating systems for succession to all key roles</p>

Model Answer

Performance Rating: Output ALEX O'BRIEN		
KPI	Notes	Rating Score: where 1 = Partially meets,; 2 = Meets; 3; = Exceeds expectations
1. Reducing harm	Has exceeded the target reduction	3
2. Increasing safety	Has exceeded the target increase	3
3. Patient mortality	The outcome states "amongst the lowest" so it is unclear whether it meets or exceeds the original target	2

Performance rating	What does it look like?
Partially meets expectations	<p>Employees can evidence that they have met some of the objectives / tasks / on-going work responsibilities set for them, but not all of them. This can be for a variety of reasons that need to be explored further with the individual.</p> <p>Employees here often need to have the objectives / tasks / on-going work responsibilities and expectations associated with these clearly described and broken down for them, and often need extra supervision and support to achieve them.</p>
Meets expectations	<p>Employees are clearly and unambiguously able to evidence how they are meeting their objectives / tasks / on-going work responsibilities set out for them and the demands within their role (e.g. completed a project, providing a service etc.)</p> <p>Employees here will be given objectives / tasks / on-going work responsibilities and simply deliver them with little, if any supervision. They sometimes go unnoticed in doing this, but you know who they are as they are often the 'go to' people as they are known as reliable to get things done.</p>
Exceeds expectations	<p>Employees not only evidence how they have met the expectations of the work objectives / tasks / on-going work responsibilities that they have been set, they show how they take them all to the next level with their own individual flavours.</p> <p>Employees here only need to be given the vision/high level expectations of what needs to be achieved, and they do the rest, making it all into a reality, bringing their own flare and added value. They are the high impact people you go to when you need something achieved with creative flare and added value.</p>

Summary

Potential	Is driven and ambitious, needs to consider whether the upward progression Alex wants is associated with the type of role she would enjoy e.g. clinical vs. management. In addition, the requirement to lead and inspire teams as well as develop others would continue to be important, if not increase, and consistent positive evidence of this is not apparent.		
Colour Rating	Blue - meeting performance expectations / outcomes, but not always demonstrating the right behaviours in doing so and may require support in aligning her behaviour.	Overall Output Performance Rating	3 Target performance levels have largely been exceeded
		Overall Behaviour Performance Rating	2 'Meets' required behaviours; however it should be noted that although there is more evidence of positive behaviours, the evidence is mixed.
9 box grid position	There is no easy fit with the 9 box grid options however the recommendation is most likely to fit with 'Transition Employee' due to Alex needing support and development in some of her behaviours before she could progress.		
Risk of Loss	High – she wants to be a Divisional Director in the next 12 months		
Comments for Talent Review	<ul style="list-style-type: none"> • Strong influencing skills and seen as a positive member of the team, however also can be harsh in her approach – lacks some self awareness • Highly driven • Approach to decision making is more intuitive than analytical however is able to make decisions with speed • Query regarding future career paths – does she want to maintain client contact or will she be at her best in a management focused role – query generalist vs. professional talent? • Concern about mobility – how likely is there to be a Divisional Director or other role in West London? • Query re receptiveness to others' ideas (reaction to feedback) and unwilling to listen to Operational Lead • Needs to focus on developing the team so she has a strong "number 2" who could replace her should she progress • Would benefit from learning about and adopting a more coaching style. 		

Model Answer

Use this page to record any key notes about the individual that relates to their potential. Remember to focus evidence-based, objective information to justify your ratings.

Potential Notes

As per the Talent Management Conversation tool, consider potential, **ambition**, and **motivation** to develop at their current level and **how far off** they are from their next career goal e.g. 1-3 years, 3-5 years or within the next 12 months.

In considering potential;

1. Bear in mind potential for what e.g. a leadership role, a people management role, a more operationally orientated role, short term/ long term?

From Alex's perspective it's potential to become a Divisional Director as this is her desired next step in her career and she wants this to happen in the short term (next 12 months)

2. How open is the individual to develop their areas of weakness/any gaps in their capability in relation to a new role?

Alex does not appear to be very self-aware and tends to be defensive in response to feedback.

3. How much development is needed for them to be ready for the next role?

Provided that she could buy in to the need to change and to adapt some of her behaviour she could make changes in the next year, if less receptive then more time could be required or she may have reached her optimum level.

4. What are the implications of attaching a particular label to this individual e.g. flight risk, false expectations?

There is a flight risk as Alex lacks self awareness and may challenge the need for her to make changes to her behaviour. The fact that she's not clear on whether the Divisional Director role is the right step for her means there is less risk as she is less certain about that being her next role, so there remains some flexibility.

5. How mobile is the individual, what level of flexibility is required for the role in question and is that aligned with their career aspirations?

There appears to be some uncertainty in her mind as to whether the Divisional Director role is right in terms of role focus and work life balance. Her mobility is limited to West London which would also affect the likelihood of a suitable role becoming available.