

PHYSICIAN LEADERSHIP IN AMBULATORY CARE:

# The Role of the Physician Access Leader

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**P**atients are becoming savvier about how they access healthcare. In our increasingly digital world, patients expect to find information quickly, reach their providers easily, and make appointments online. They want to compare clinics and physicians with Google searches and web reviews. To meet these expectations, health systems are incorporating at least one physician access leader (PAL) into their ambulatory leadership structure as a necessary part of the building, budgeting, and refining efforts to make their ambulatory services more accessible.

PALs provide specific benefits that an administrative leadership team may not be able to deliver.



In this article, we explore the growing importance of having a PAL on your leadership team and review their responsibilities and key skills. We also examine the impact on an organization's culture on this role and how your health system can support the PAL.

## The PAL's Primary Responsibilities

This is an emerging role in the market; as such, the responsibilities may vary between organizations. Typically, the PAL is a physician who is part of the ambulatory operations leadership team and oversees all access initiatives. This may include the following:

- Template design scheduling, optimization, and centralization
- Contact center and centralized services management
- Patient communication and engagement strategies
- Nurse triage and advice implementation and oversight
- Provider capacity management
- Virtual clinical care organization and delivery (e.g., virtual visits, e-visits, clinical navigation)
- Referral and patient intake management

Regardless of how the organization is managed and structured (e.g., the degree of centralization and standardization), the PAL's responsibilities encompass four major areas: communication; clinical oversight and protocol development; change management, and leadership.

## COMMUNICATION

One of the PAL's most important responsibilities is to effectively communicate access initiatives to the health system's stakeholders. This includes interacting with physicians to understand their concerns, with executive leaders to champion the importance of these efforts, and with ambulatory leaders to bridge any gaps in communication.

## CLINICAL OVERSIGHT AND PROTOCOL DEVELOPMENT

Clinical functions such as ambulatory nurse triage, answering services, and refill services rely on standardized decision support tools. PALs review, modify, and rightsize the ambulatory protocols that are used by contact centers or practices, in alignment with the organization's patient management goals. Although PALs are not necessarily involved in day-to-day clinical oversight, they serve an integral role during the launch of these services and the development of protocols.

## CHANGE MANAGEMENT

The PAL plays a key role in change management, as they are the primary contact for physicians and executive leadership. In large-scale changes such as the centralization of phones or schedules, the implementation of a nurse advice line, or template optimization, a PAL's guidance and communication with senior organizational leaders is crucial.

## LEADERSHIP

PALs play an important leadership role in a health system's contact centers and other access-related entities and they offer a unique clinical perspective to the system's leadership. Their efforts include:

- Advocating for improved patient experience.
- Monitoring the impact of access initiatives on provider wellness.
- Championing clinical issues at the contact center(s).
- Providing legitimacy to operational decisions.

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■ To see how a PAL impacts an organization's success, read our case study with UC Health:

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## The PAL's Key Skills

An effective PAL must have a specific set of skills. Keep the skills outlined below in mind when recruiting your next PAL.

PALs have conversations that are potentially sensitive with a variety of people, and they need to be able to **adapt their communication** methods accordingly.



### ACTIVE LISTENING

PALs must understand stakeholder frustrations and act upon them appropriately. When implementing a new program or initiative, a PAL may visit all the participating clinics prior to go-live, listen to provider and staff concerns, respond, and then modify the workflows and communications accordingly.

### PROBLEM SOLVING

PALs must make decisions that do not negatively impact provider practices and daily routines. This can be difficult, as decisions need to be made quickly. Sweeping changes may have unintended consequences; decisions that benefit one provider may hinder another. The ability to quickly and pragmatically solve problems for providers is critical. By acknowledging that each provider is unique and faces different challenges, PALs can implement changes in a way that is least intrusive and benefits providers the most.

### PRIORITIZATION

If the PAL is too focused on the clinical aspect of their work, executive leadership will not trust them to make the decisions that are in the financial interest of the health system. It is important to balance the needs of both sets of stakeholders, clinical and administrative. Determining which group of stakeholders requires more focus and action is an important skill. Both sides are equally important, but PALs must prioritize what group and which issues need to be addressed first. For example, while some PALs will spend the majority of their time visiting physician colleagues to help with change management, others may need to meet with the executive leadership team to contribute to budgeting, innovation, or organizational improvement.

# Cultural Impact on PALs

The culture and characteristics of each health system have a profound impact on how a PAL performs their duties. When hiring a PAL, the organization should reflect on its culture, particularly in the categories described below. For example, a candidate who would be a good fit in an innovative, complex organization may not be a good candidate for a smaller organization that resists change.

## ORGANIZATIONAL INNOVATIVENESS

Innovative organizations are more willing to take on bold, new initiatives. For example, they will be more likely to consider a contact center as a vehicle for enhancing the patient experience rather than a mechanism to decrease labor costs. In this context, the PAL will be able to strategically evaluate new services and determine which ones the organization should offer in order to remain competitive. In innovative health systems, executive leadership is more likely to assist the PAL with both change management and provider communication.



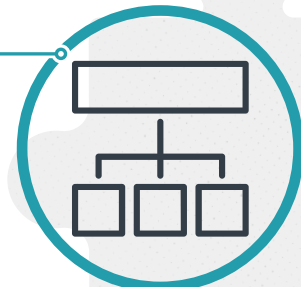
## ORGANIZATIONAL COMPLEXITY

The structure of an organization determines the role of the PAL, and it varies within a medical group, corporate C-suite, or hospital. Different entities and groups (e.g., contact center, nurse triage center, transfer center, template management team) may reside within a variety of reporting structures throughout the health system. As organizational complexity increases, PALs often find themselves spending more time in administrative meetings and on change management.



## ORGANIZATIONAL SILOS

In an organization that is made up of siloed groups, executive leadership may assume that the PAL will be able to bridge any differences between disparate departments or entities, which is rarely the case. While the PAL may engage with different organizational units during implementation and go-live of initiatives, it will take buy-in and the appropriate resources from executive leadership to knock down the silos.



## ORGANIZATIONAL SUCCESS

Is the health system thriving and growing, or is it struggling to maintain a competitive edge? With fast-paced, successful health systems, executives tend to give PALs more autonomy, allowing them to focus less on financial performance and more on enhancing the patient and provider experiences. At more deliberate—and bureaucratic—health systems, PALs may be involved in more administrative tasks and change management activities (e.g., defining success, attaining defined goals and metrics).



## Finding a PAL

When a health system looks to hire a PAL, it needs to recruit with the goal of adding a member of the leadership team. The PAL will not only be deeply embedded in the access team during go-live and stabilization of initiatives, they will also be seen as a senior leader by providers and staff alike. Consider the factors below for this type of onboarding.

### EXPERIENCE

A PAL should have sufficient clinical experience, in a variety of settings, to be respected and considered “legitimate” by both physicians and organizational leadership, because this role will impact the access structure and workflows. A PAL should have enough administrative, leadership, and operational experience to knowledgeably undertake healthcare system initiatives and communicate with key leadership in shared decision making. For systems that have a contact center, or are planning to build one, a PAL with related leadership experience is preferred.

### SPECIALTY AREA

If the PAL is expected to lead a contact center, ideally their experience would be in the specialty area that is the center’s focus. For example, if a contact center is working with a surgical specialty group on workflow and triage design, a similarly trained physician would best represent the surgeons. Scheduling and triage workflows for surgical practices involve preoperative appointments and consultations, procedural scheduling, and postoperative follow-up appointments. A physician with first-hand experience with these processes can provide invaluable insight into the call center’s behind-the-scenes operations.

### ESSENTIAL SKILLS

PALs are often key intermediaries between system leaders and the access team, serving both as a representative of the physicians and as a “translator” for senior leadership. Candidates must have the flexibility, authority, and ability to balance competing priorities, enhance communication, and help move goals forward.

### FINDING THE PERFECT FIT OF SKILLS AND EXPERIENCE

If your health system has not yet incorporated this role into its leadership structure, we recommend that you start thinking about it now. A PAL can improve patient access, help implement new initiatives, and achieve organizational goals. Health systems that are thoughtful about the type of leader they need and the roles they require from a PAL will benefit most. Whether your system has a large, centralized contact center or is just beginning to focus on patient access across specialties, a PAL can help drive the initiatives needed to improve patient access and elevate the consumer experience.

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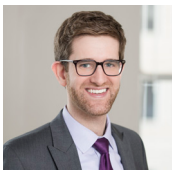


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