



In November 2005, the Southwind consulting management team gathered for its annual corporate planning retreat. Pictured above are: Stacy Moss, Eric Passon, Rosemon Martin, Peter Kindrachuk, Margaret Hoban, John Deane, Ann McFarland, Randy Gott, Rick Adams, Kara Moore, Vince Manoogian, Mimi Hagar, Jack Hickey, Sue Mackintosh and Kerri Kelly.

## INSIGHT FOR A NEW ERA

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enefit the most and to learn what strengths are most impressive to our customers."

### Deep Knowledge Base

Time and again the survey demonstrated Southwind clients' appreciation of the depth of knowledge and experience of the Southwind team.

Jerry Fedele, President and CEO of West Penn Allegheny Health System, expressed this widely held feeling: "Southwind's knowledge of the physician market was as comprehensive as I've ever seen, and they have practical experience to back it up."

A senior executive at another institution agreed: "They had an ability to get their hands around the complexity of the issues."

Others commented that the Southwind team's ability to quickly and accurately assess their physician organization set them apart from other firms.

Craig Kilgore, Executive Director of Holston Medical Group out of Kingsport, Colorado, seems to have seen value across the board. "The thoroughness of the engagement exceeded my expectations, the analysis provided was excellent, and their presentations of findings, both oral and written, were very, very good."

### Responsive and Flexible

There were a number of positive comments about the team's responsiveness and flexibility – and that Southwind's current size was a contributing factor.

As Robert Elston-Pollock, Department of Medicine Administrator at UMass Memorial Medical Center, explained, "We had a complicated project. Southwind was responsive and flexible.

Their size helps them. They are not too small or too large."

Other respondents noted that Southwind's willingness to get into the "nitty gritty, day-to-day issues" was

**"The differentiation from other consultants is that Southwind is at my comfort level. I didn't feel they were here to find something wrong. I felt they were here to help us,"**



Michelle Streeter, VP Finance & Administration, UMass Memorial Medical Center

refreshing. Several clients remarked about the high productivity of the team, the timeliness of responses and the passion Southwind consultants brought to the work.

### Sustainable Results

Of course, results seemed to be at the top of everyone's list.

"Sustainable results were what I was looking for," reported one respondent, a CEO, during Southwind's engagement at his organization. "We'd done this twice before with less satisfactory results, but Southwind changed processes, mindsets, and aligned managers. The impact continues to positively impact us to this day."

Southwind's focus on delivering ongoing value was reported as something unique among consulting firms. Clients said that while most consultants just answer questions or give ideas, Southwind's hands-on approach meant that changes were actually implemented.

### Honest and Candid

Survey respondents said that they were impressed by the team's ability to be very frank, up front and honest. One respondent said, "Their candidness with everyone was of great benefit. They were open and honest, even if the situation was uncomfortable. It was something we needed."

Another client added, "Southwind was blunt when they thought there was medicine we needed. Once, they told us our physicians' space was embarrassing. 'You won't be top-10 as is.' Now ordinarily, that might have been taken as horribly insulting, but they put these things on the table because they were relevant. Only an experienced, confident outsider who we respected could have said that and gotten a desirable result."

### Going the Extra Mile

When you ask your clients for honest feedback, sometimes you get insight you never expected. The 2005 survey results were no exception.

One client cited the value of the Southwind relationship *after* the engagement was over: "I never felt them pushing me away after the engagement was complete. Occasionally I had questions. Being able to work with someone at Southwind from time to time, on a minimal basis, is great. How we were treated and respected after the deal means a lot."

When an engagement is complete, any good consulting firm wonders if they could have done something more, or done something better. Southwind asked clients this question, and never expected the following view: "I don't know if they could have. They met our short time frame; hit every deadline, every point. They were right on schedule."

The mere mention of outside consultants can foster a natural fear of

the unknown among in-house middle management and staff. "Is my job on the line? Will they just be in the way?" Southwind strives to put such negative expectations to rest, but it is never easy.

"The engagement was short, sweet and to the point. No lingering, negative consequences. In and out is positive. They validated me," answered one Assistant Vice President.

A CEO commented on the changes he saw in his staff. "I saw a few people in the business office really grow, stand up and lead. The engagement allowed them to show their skills. One of these people now runs the entire department."

"This is not unusual," says Kindrachuk. "We've found hidden jewels at many of our engagements. It's our job to discern untapped talent and resources and help foster their development; and if I may get personal for a moment, those are some of the true joys of the work we do."

## THE BOTTOM LINE:

### Clients Willing to Recommend Southwind

While many of the survey questions were taken from the 2003 survey, one new question asked how likely the client would be inclined to recommend Southwind to another healthcare institution for practice management and consulting services. Respondents were asked to answer on a scale of one (most definitely) to five (definitely not).

Overwhelmingly, respondents gave Southwind a score of one. Two respondents out of 34 indicated that their recommendation would depend upon the situation, while the remaining 32 respondents said they would most definitely recommend the company.

## SOUTHWIND EXECUTIVE TEAM: THE KEY TO CLIENT SATISFACTION

Given that Southwind personnel spend the bulk of their project time on the ground in client facilities, learning from, teaching and meeting with key stakeholders, it is understandable that clients would have some strong opinions about the firm's management consulting team. Several pointed survey questions were designed to elicit those opinions.

### Integrating with the Local Team

A key success factor for Southwind engagements is the interim management team's ability to interface with the local management team – to fit in.

Clients were impressed at how Southwind became "part of the [local] team" and showed a high level of ownership in the outcome. Several respondents felt as though the Southwind team "fit right in." "They sing from the same song sheet," as one put it.

Many clients fondly remembered the relationships built with Southwind executives and the personal growth witnessed among their own staff as they were exposed to new ideas.

### Turning Ideas into Action



**"Southwind's people got into a lot more detail than I had first expected. I was expecting for us to do a lot of work ourselves, but they did much of it."**

Rob Tonkinson, VP Finance, Carle Foundation Hospital

W.C. Dandridge, Jr., MD, MBA, CPE, Chairman of St. John's Regional Medical Center's Physician Advisory Committee in Joplin, Missouri mirrored Rob Tonkinson's observations: "We have consulting firms all the time. I'm generally not high on them. Mainly consultants do a good job with ideas but don't act upon them. This firm is action oriented. They do it. Others just tell how to do it."

### Building Trust

Respondents appreciated the Southwind

team's ability to inspire confidence and build trust. Southwind's skill at creating rapport with physicians was especially appreciated.

One CFO said, "In our Cardiology engagement, they developed trust with the physicians who, at that time, didn't trust anyone. They endeared themselves to the physicians and got them to see what was being asked of them wasn't personal."

Another client referred to John Deane, Southwind's CEO, as a "natural teacher" who was able to effectively win the trust of the physician group.

A CEO commented on the communication style of Vince Manoogian, a Director: "There was an ease working with him. He sat down with each board member one on one. Such exchanges are so much better than any report."

Two different clients made near parallel comments regarding Margaret Hoban, Southwind's practice leader for Revenue Cycle Solutions: "Confidence, knowledge base, breadth of experience, credibility, they all stand out," answered one. "Her knowledge, depth, and breadth of experience showed through," said a second.

Reacting to these near duplicate responses, Peter Kindrachuk said, "It shows our clients are seeing a continuity of service between projects. These are the results we are looking to obtain."

### Financial Acumen

Analytical skills stood out to another respondent: "I was impressed with his ability to run numbers, during meetings, on the fly. He wasn't cowed by tough questions that came up."

"Our client's view of the Southwind team as expressed in the client survey is very gratifying," said Deane. "We appreciate the positive feedback about our people."



**"Southwind's knowledge of the physician market was as comprehensive as I've ever seen, and they have practical experience to back it up."**

Jerry Fedele, President & CEO, West Penn Allegheny Health System

## Southwind launches updated web site

The Southwind web site has been re-created to improve its usability, appearance, and to reflect more comprehensively the scope of services we offer. We invite you to explore the new site and welcome your feedback!

[www.SouthwindHP.com](http://www.SouthwindHP.com)

## SOUTHWIND NEWS

Published From Time to Time For Southwind Clients and Friends

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## KEY REQUIREMENTS FOR COMMUNITY NEED BASED PHYSICIAN MANPOWER PLANNING

Quantitative and Qualitative Analysis Are Both Critical to a Successful Strategy

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The legal implications of 'documenting community need' are wide-ranging and somewhat unclear. However, in light of recent investigations of health systems in areas such as physician recruitment, medical directorships, and compensation arrangements, it is clearly prudent business practice to thoroughly document the process. Documenting community need demonstrates the intent of the

health system in its recruitment activities and other relationships.

**Documentation is generated through a medical staff planning or physician needs assessment process.**

This process involves:

- an understanding of the mission, goals, and strategic direction of a health system;
- an assessment of the needs of the community it serves; and,
- establishing priorities by specialty to meet the needs of the hospital and community.

When done on a comprehensive basis, a physician needs assessment will strengthen the ability of a health system to meet the needs of its community through its physician affiliations. It is also an essential process in the hospital's overall strategic thinking and its overall survival.

**A comprehensive plan must incorporate both quantitative and qualitative analysis.**

Quantitative, or statistical analysis tells only part of the overall story of what is going on in a medical community. There are a multiplicity of other factors that may strongly influence a community's needs, including:

- **Accessibility of physicians/specialties** – timeliness and availability of physicians in a specialty for referral and consultation;
- **Physician attrition** – physician retirement, 'slowing down', and reduced FTE due to age, family considerations, lifestyle, etc.;
- **Scope of practice** – lack of the full range of expected services in a specialty;
- **Cultural preferences** – a segment of the service area population that is best served by a physician of similar culture and background; and,
- **Clinical trends** – new technologies and expertise in new procedures not provided by current practitioners.

**A qualitative process that engages the medical community can be achieved through a well crafted survey process and/or confidential interviews of physicians.**

There are advantages to both methodologies.

- The written survey can gain a wide range of specialty responses in a short period of time.
- Questions can be developed to 'customize' the analysis to a specific organization. It can easily provide information related to physician/specialty accessibility, perceived strengths and weaknesses in the medical community, recommended recruitment priorities, referral patterns, perceived needs by specialty, etc.
- Confidential interviews may take more time and resources to complete, but also allow physicians to offer deeper insights and to raise unanticipated issues.

Our recommendation in most cases is to conduct both the interviews and survey, since the results of the two offer valuable insights.

**The qualitative analysis can confirm the statistical needs of a community, but may also cause the organization to examine issues beyond the scope of statistics.**

For example, a statistical analysis may indicate that there is no need for additional physicians in a particular specialty. However, learning that referrals are sent out of the community due to inaccessibility, or limited scope of practice issues, brings an insight that data could not communicate, and could substantiate a need for additional recruitment.

Community need documentation requires a statistical analysis of the service area, but to effectively meet the needs of a community, there must be a thorough analysis that considers all factors impacting need. It is our view that the qualitative analysis is equally important in documenting the physician needs of a community and the documentation necessary to recruit additional physicians.

# SOUTHWIND NEWS

VOLUME 8, NO. 1  
MARCH 2006

## INSIGHT FOR A NEW ERA – SOUTHWIND ASKS CLIENTS FOR CANDID ASSESSMENT

BY ART PELLETT

**Listening carefully to clients is the backbone of Southwind's success as a physician practice management and consulting firm. While we strive to accurately understand each client's unique situation during every interaction, from time to time we find it instructive to ask our clients for honest feedback about our overall performance.**

### CAN SOUTHWIND BE AS EFFECTIVE AT TWICE ITS SIZE?

In the two short years since our last client survey, Southwind has entered a new era, doubling the size of its executive management consulting team and nearly tripling its client base. To accommodate this growth, Southwind has made revisions to its leadership structure, most notably with the addition of Peter Kindrachuk as President and Chief Operating Officer. As we headed towards the end of 2005, it was time again for Southwind to gauge clients' impressions of its performance through another third-party led survey.

Late that year, 34 telephone surveys were conducted (like the 2003 survey, we achieved a response rate greater than 60 percent). "The feedback we got from our

clients was tremendous," said Kindrachuk. "The answers varied from prior, but that's to be expected. Southwind is not the same company it was even two years ago. The survey helped us to see how our clients see us today."

Deane and Kindrachuk shared the results with the entire Southwind team at its annual corporate retreat held in mid-November. The information was useful in focusing the group's discussion about performance during the previous year as well as the future direction of the firm.

### SURVEY REVEALS KEY STRENGTHS

The goal of the survey was to understand what Southwind was doing right and to discern what the organization could be doing better. "Going forward we wanted to understand our clients' view of the Company's strengths," said Deane. "We think we have a pretty good idea of what those strengths are, but it was nice to have them validated by those who actually ben-

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LETTER FROM  
THE CEO



John A. Deane, CEO,  
Southwind Health Partners

Dear Colleague:

The past two years have been significant in terms of positive change for both Southwind Health Partners and our clients. Our firm has traditionally had a very small overhead footprint, but at the encouragement of several satisfied clients and industry leaders, and after much internal consideration, we determined that there were advantages in controlled growth.

During the past two years, Southwind has added nine management consultants to our team. Today, the firm serves 26 clients in 19 states.

A key decision was the addition of Peter Kindrachuk into the President and COO role. Peter and the executive management consulting team he has recruited have been great additions that have dramatically expanded Southwind's capabilities.

Recently, we have been joined by several talented executives: Dick Wright has joined as Senior Partner. With over 35 years of health care experience, Dick brings considerable expertise to our client's senior management and Boards of Trustees; Randy Gott and Kerri Kelly have joined us from Cejka Consulting to serve as Vice President and Senior Consultant, respectively, and are focused on providing not-for-profit health systems with physician manpower planning services and assistance with physician recruitment policy development;

As this goes to press, Andy Kellar has joined as Director, and will be focused on strengthening our capacity in physician practice management assignments as well as managed care contracting; and Maureen Madigan has made a full time commitment to Southwind's Revenue Cycle Solutions Team.

As the Company grows, it is even more vital that we survey our client base regularly. Thanks to our clients, the survey participation rate was outstanding and we obtained valuable advice and candid feedback. I am delighted to share the substance of our findings with you in this issue of *Southwind News*.

Thanks for your continued support!

With warm regards,

John A. Deane  
Chief Executive Officer