

Kaiser Permanente Uses the Myers-Briggs® Assessment to Enhance a Broad Range of Training

A Case Study of Kaiser Permanente

It's Tuesday, and if she were not an experienced consultant, even Judith O'Rourke might find the week confusing. After training registered nurses in communication skills yesterday, O'Rourke, senior learning consultant, must switch gears and lead a team-building exercise for a group from one of Kaiser Permanente's administrative departments. Switching gears yet again, O'Rourke will spend the remainder of the week in a session of an intensive three-day Facilitative Leadership program for middle and upper managers.

A consultant could get disoriented, but common threads help. In O'Rourke's work, one important common thread is the use of psychological type to help participants understand themselves and their relationships with others. With 55,000 employees in northern California alone, and 11,000 physicians nationwide, California-based Kaiser Permanente is one of the largest healthcare providers in the U.S.

BETTER PATIENT CARE THROUGH TYPE SENSITIVITY

Registered nursing quality liaisons, or RNQLs, work to improve the quality of patient care by acting as liaisons with nursing staff and managers. Kaiser nursing staff and management are both committed to safe, quality patient care. Effectively communicating perceptions, ideas, and priorities to improve processes and ultimately improve patient care, however, is not as easy as it sounds. There is a natural tendency to assume that one method of communication (the one we most prefer) will work effectively with all people.

O'Rourke's solution was to introduce the concept of psychological type, using the *Myers-Briggs Type Indicator*® (MBTI®) instrument published by CPP, Inc. She helps the nurses apply what they learn through the FLEX Care workshop developed

by Judy Allen and the late Susan A. Brock and published by the Center for Applications of Psychological Type (CAPT). "The 'Flex' approach is first to assess your own preferences, and then briefly to flex toward the communication preferences you observe in the person with whom you are communicating. Just a small adjustment in what you say and how you say it can yield a big payoff in effectiveness," said O'Rourke. The FLEX Care system is specially designed for healthcare practitioners. FLEX Talk and FLEX Sell are also programs used by O'Rourke for other teams.

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"Our work with the RNQLs has results on two important levels," O'Rourke continued. "As they tune in more to com-



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munication preferences different from their own, they are becoming more credible and therefore more successful as liaisons on behalf of patient care. And they are helping to spread understanding that patients are different—that is, of different types from each other—and that communication with managers and others can be improved with sensitivity to type and a bit of flexing. Research reported in *Health Care Communication Using Personality Type: Patients Are Different!* by Allen and Brock shows that when patients or clients are satisfied with communication two important things happen: (1) clients and colleagues feel seen and heard, and (2) they perceive the medical care practitioner/colleague to be more competent. In a clinical setting, patient satisfaction scores go up. In an administrative office, employee satisfaction goes up.”

TEAMS REALIZE GREATER EFFICIENCY, REDUCED STRESS

A particular administrative department within Kaiser Permanente was struggling with the teamwork required to manage large and complex projects. This business unit was a microcosm of California in terms of diversity—a mix of ages, sexes, and cultural backgrounds, including European, African American, Latino, South Asian, and East Asian. Additionally, the staff were divided into separate offices in northern and southern California, but the most important form of diversity in this department was diversity of personality type. People who were not natural organizers had been given responsibilities requiring organizational skills. One manager preferred not to confront employees. And there was no consensus concerning the department’s procedures.

A newly hired project director recommended to the department manager that the group undergo team-building training. Enter Judith O’Rourke. Her tried-and-true Type and Teams workshop requires six hours—starting with an introduction to psychological type, proceeding through discussion of the individual participants’ results, and then moving to organizational, leadership, and teamwork issues. But the group wanted more. Before the project was completed, O’Rourke had conducted one workshop for the northern office only and a second one for both offices, plus special coaching for the two top managers.

One participant recalled, “When Judith led us through a Living Type House exercise—that was when it began to click. We stood in groups on a big Myers-Briggs® type ‘16-room floor plan’ matrix, and we began to realize how different some of us are from others. It became much easier to understand

why others act and communicate the way they do. The payoff came in greater efficiency and reduced stress as we shifted tasks and responsibilities to take advantage of each others’ strengths, as we developed more respect and understanding for each other, and as we moved toward consensus on general principles. We would like to do something like this every year.”

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“Team-building efforts must be tailored to the team. And it is often the case that unique, little things can make a big difference,” observed O’Rourke. “In one group, a manager who loved to use birthday celebrations for team building learned that one team member was not pleased to have his birthday celebrated at work. And we moved a long way toward improving communication between a younger supervisor and an older subordinate where there are differences of sex, race, and cultural background. Yes, I would like to help this group with a follow-up exercise next year.”

O’Rourke has extensive experience dealing with California’s famously diverse workforce. Her conclusion? “Respect for diversity is more than skin deep. True respect for diversity requires understanding of type. We can use differences to strategize, to create a stronger future for organizations.”

THE FOUNDATION FOR EVERY LEADERSHIP TEAM-BUILDING PROGRAM

Kaiser Permanente presents the three-day Facilitative Leadership course developed by Interaction Associates as part of its leadership development program. Its goal is to facilitate the development of leaders who are collaborative and receptive in their processes, and strategic in their thinking. Participants

learn that there are seven different Facilitative Leadership practices—essential elements of leadership. O'Rourke sees awareness of type embedded in the course design. Outside the course, she uses the MBTI instrument to look at how the *preferences* of leaders can affect their receptivity and use of Facilitative Leadership *practices*.

Participants learn that no one practice is best for every situation. "When we add psychological type to the equation," reports O'Rourke, "our managers understand better why they immediately prefer to use some but not all of the seven practices more than others. That realization makes it more likely that they will try out, rather than reject, a less preferred practice."

Judith O'Rourke has seen leadership training and team-building fads come and go. "People will have less trouble choosing the best approach if they understand that psychological type is a valuable foundation for every leadership and team-building program. Constructive use of differences, in a team or an organization—consistently and consciously practiced—will lead to higher satisfaction and to improved teamwork and retention."

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