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Transitioning into a Leadership Role

LEARNING OBJECTIVES

1. Discuss leadership traits that can be developed on the job
2. Discuss types of leadership roles available within Central Service/Sterile Processing
3. Review the challenges of transitioning to a leadership role
4. Review ways to transition into a leadership role

Instrument Continuing Education (ICE) lessons provide members with ongoing education in the complex and ever-changing area of surgical instrument care and handling. These lessons are designed for CIS technicians, but can be of value to any CRCST technician who works with surgical instrumentation.

Earn Continuing Education Credits:

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LEADERSHIP IS DEFINED AS “THE ABILITY OF AN INDIVIDUAL OR organization to lead or guide other individuals, teams or entire organizations.” Opportunities abound for those who wish to assume a leadership role; however, it should be noted that a specific position does not need to be attained in order to become a leader. Whether Central Service/Sterile Processing (CS/SP) professionals prefer to stay in their current department or seek advancement or promotion outside of CS/SP, personal and professional development will enable technicians to more easily and proactively prepare for the transition to leadership.

CS/SP professionals are comprised of a unique group and many of those individuals rely on on-the-job training to fulfill job demands. Opportunities for formal and post-secondary education related to the functions within CS/SP may be limited and requirements for professional certification vary state by state. Still, there are independent study programs, facility-approved educational opportunities, conferences and workshops available. This lesson plan will provide information to help CS/SP technicians transition into a leadership role.

OBJECTIVE 1: DISCUSS LEADERSHIP TRAITS THAT CAN BE DEVELOPED ON THE JOB

In general, a good leader will be knowledgeable, focused, disciplined, and honest. They will also demonstrate integrity, consistency and humility, and a willingness to share success.

Opportunities to gain knowledge are unlimited, cost effective and easily accessible in the field of CS/SP. Many

healthcare systems have or are developing their own training courses for advancing their employees from entry-level CS/SP technician positions to management positions. In addition, there are now online and face-to-face vendor-provided opportunities for development, as well as certification programs for CS/SP professionals.

As with any profession, experience and success in entry-level technician positions should be a prerequisite for any leadership position. Entry-level technician positions provide the critical learning needed not only to understand the facets of the job, but to offer the skills/hours required to apply for certification through professional certification programs. The best knowledge gained during on-the-job training is a thorough understanding of all positions within CS/SP. It will be very challenging to lead others if the leader lacks understanding of certain positions or responsibilities.

Leaders must have a clear vision of where they want to go and, more importantly, where they want their



department to go in the future. Leaders must not only have this vision but also the ability to develop and implement a plan for success; this takes skill, tenacity and passion for their profession while generating support for others to implement their plan for success. Vision can be highly motivating for both the new leader and the team. Vision provides a focal point that gives the leader and team something to believe in and work toward.

Strong leaders are disciplined and consistent. They set priorities and create a set of actions that will meet those priorities. This focus enables them to drive action and achieve results, while inspiring and encouraging others to participate. Focus will help leaders prioritize the daily multiple demands required to successfully lead the department. Due to the complexity of instrumentation in CS/SP reprocessing, having the ability to stay focused on details, instructions for use and standard operating procedures – and also having an understanding of the consumable items (e.g., chemical dilution, quality testing, etc.) – is required to ensure devices processed are clean, safe and ready for use. Without focus in CS/SP (from the entry-level employee to the manager) patient safety is jeopardized.

At the core of every true leader is a trust and value system that hinges on integrity. Leaders not only talk the talk, but they also walk the walk. They do not take shortcuts and they demonstrate proper practices through positive example. Good leaders are honest, forthright and open to employee input and concerns, which allows employees to feel comfortable in approaching them with information and ideas. A trustworthy leader generates more loyal employees and promotes trust throughout the team.

Leaders do not view themselves as better than or above the rest of the team. They treat others the way they expect

Great leaders share success with others and are willing to give credit to others for success within their department or departmental area. This also creates an environment of trust and respect, and it can lead to improved employee satisfaction and retention, both of which can lead to a high-performing team. Without shared success, there is no team.

to be treated and work to support the overall efforts of the team. Leaders do not judge; instead, they work to establish trust and mutual respect within their team. Leadership is being a servant leader (being of service to others) rather than being served by others; therefore, the best leader is a mentor, not a boss.

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OBJECTIVE 2: DISCUSS TYPES OF LEADERSHIP ROLES AVAILABLE WITHIN CENTRAL SERVICE/ STERILE PROCESSING

As the CS/SP industry grows and becomes more complex, so do CS/SP professionals' duties. All facilities, regardless of size or surgical complexity, should have at least one CS/SP technician

position and a person in a supervisory role. As the size and complexity of a facility increases, there can be additional positions, such as lead technicians/Level II CS/SP technicians, instrumentation specialists, Surgical Support technicians, supply technicians, educators, implant management coordinators, inventory control managers, supervisors and departmental managers. Departmental managers may have titles such as supervisor, manager or director of CS/SP. The CS/SP manager or director typically represents the top leadership position within the department; however, some healthcare systems are increasing leadership positions at their corporate offices, which can expand professional growth opportunities. In addition, well-qualified and experienced CS/SP leaders may have opportunities throughout professional or regulatory agencies (e.g., in surveyor/inspector roles, etc.) *Note: Both unofficial and official leaders can be found in any of the previously listed positions, depending upon the leadership traits they possess.* Unofficial leaders in the workplace might be those to whom people turn to for help, advice or technical questions. Unofficial leaders can be just as important to the team as official leaders.

CS/SP professionals seeking to advance their knowledge and pursue a leadership role should routinely engage in self-evaluation to determine whether they have the skills, knowledge and positive traits to lead effectively.

OBJECTIVE 3: REVIEW THE CHALLENGES OF TRANSITIONING TO A LEADERSHIP ROLE

Moving from an entry-level position to a leadership position often delivers some challenges. Many new leaders make the mistake of attempting to continue all the duties they performed prior to the transition; this leaves little time



to effectively assume new leadership responsibilities.

A new leader must be willing to let go of many of the previous responsibilities; this can be accomplished effectively by mentoring and then delegating others within the department to assume those duties. Not only will the new leader have more time to focus on his or her leadership roles, mentoring and delegating others to take the lead in performing new tasks can provide employees with valuable knowledge-building and career growth opportunities.

Leaders must be ready to step into the new role and be prepared for the challenges of laying the foundation for improved outcomes and teamwork – and consistently supporting the department through effective communication and management skills. There may be times when a new leader feels their new role, ideas and leadership approach are being met with resistance by others in the department; this can be more common when an existing member of a team promoted to a leadership position and others on the team have to adjust to the new hierarchy. To help ease the transition and limit uncomfortable situations in the workplace, the leader should strive to listen intently to the team, solicit input from all team members and address any concerns as they arise.

OBJECTIVE 4: REVIEW WAYS TO TRANSITION INTO A LEADERSHIP ROLE

Leadership transitions may feel a bit awkward initially, for both the new leader and the current team. The new leader is likely enthusiastic about the new role and believes they are ready to take on the world, while the team may be apprehensive and uncertain about their future. Change can be difficult and challenging for all involved. It is critical for leaders to be approachable, listen well

and remain understanding of others' perspectives and views.

Effective leaders make a genuine effort to get to know each person on the team, understand each of their goals and interests, and take accountability for personal weaknesses and mistakes. Mistakes will be made by even the best leaders and the best ideal to address them is to take accountability, learn from them and, perhaps, use them as a teaching moment for the team. Effective leaders do not blame others, point fingers, make excuses or live in the past. They understand expectations of upper management as well as the expectations of the team, and seek clarification if either of those expectations are not aligned or understood.

No one person knows everything; therefore, it is essential for leaders to continue seeking both formal and informal education and be open to new perspectives that will allow for continued growth, personally and professionally. Not all leadership decisions or approaches will be popular; however, they will be better received if they are well thought out, based on standards or best practices, and keep patient safety and positive outcomes at the forefront. Transparency can help gain trust and respect from the team. Keeping everyone informed of what is happening and why changes are occurring will help create a stronger, more cohesive team. Leadership success depends upon how well the leader communicates with, listens to, supports and mentors others.

CONCLUSION

Transitioning into a leadership role can be both an exciting and anxious time, not only for the new leader but also for the collective team. The most effective leaders understand their role in leading the team, but they also recognize they are a spoke in the wheel – where all individuals

of the team work together to keep the department running effectively, safely and efficiently. 

RESOURCES

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