Management In Physical Therapy

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Prepared by

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Introduction:

Management is essential for any organization. Management started with setting of goal, so any human groups not named administration or management unless there are goals they work in between in order to achieve these goals. Management cannot obtain goals by itself but thought others and resources. There are many definitions for management depends up on the point of view of each writer and researcher.

Definition:

Management is considered as process of coordinating of all resources through the processes of planning, organizing, directing and controlling in order to achieve the organizational goals effectively and efficiently.

Another definition:

Management is a human activity aiming to achieve a group of economic and social goals for the organization and staff through the effective and efficient use of the available resources of the organization that works in a continually changed environment.

Therefore, management is:
1. A human activity achieved through groups of individuals working in order to gain benefits for the organization and staff.
2. A productive activity depends up on efficient and effective use of the available resources.
3. A work aiming to achieve well defined goals in certain time.
4. An organization system consists of three main parts are inputs, procedures and outputs.
5. A continual activity depends on planning, organizing, directing and controlling.
6. A flexible activity as it works in a continually changed environment.
7. Economic activity acts for achieving certain goals through using the least cost.

Management functions

I. Planning
   It is the first function in the management process as it puts the framework for other component of the management process.

II. Organizing

III. Directing

IV. Controlling: This is the final function of the management process.

N.B.

The management functions are related and affected with each others.

I. The planning function

Definition
Planning is deciding in advance what to do, how to do it, when to do it and who is going to do it. Planning is the most basic of all the management functions and it is the starting point for any organization.

**Values of planning**
1. It provides direction.
2. It provides a unifying framework: Planning provides a unifying framework of decision making throughout the organization.
3. It helps to reveal future opportunities and threats.
4. It facilitates control: It ensures that organization activities are parallel to the plan, it also involves three-step cycle in which standards are set, performance is measured relative to these standards and deviations are identified and corrected.

**Steps of planning**

*Planning process is a logical set of steps can be summarized as following:*

1. Setting of objectives and their alternatives.
2. Determination of steps and procedures of working program and timetable for each step.
3. Determination of the human resources and fund required for program.
5. Evaluation of the results.

**Principles of effective planning**

1. Develop accurate forecasts.
2. Gain acceptance for the plan.
3. The plan must be a sound one.
4. Develop an effective planning organization.
5. Be objective.
6. Keep the plan flexible.
7. Revise the plan every year.
8. Fit the plan to the situation.

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**II. The organizing function**

**Definition**
Organizing is the management function that establishes the relationships between activity and authority.

**Relationship between the organizing and planning**

The managerial functions of planning and organizing are completely related. Organizing begins with and is governed by plans, and plans state where the organization is going and how it will get there.

**Importance of the organizing process**

*The organizing process should provide the following benefits:*
1. A clarified work environment.
2. A coordinated environment.
3. A formal decision-making structure.

**Steps of the organizing process**
1. Consider plans and goals.
2. Determine the necessary work activities.
3. Classify and group activities.
4. Assign work and delegate appropriate authority.

1. Determination of resources required to achieve the plan of the organization.
2. Determination of the role and responsibility of each individual in the plan of the work to avoid of any interference in the duties and responsibilities of individualities.
3. Determination of the authority: Authority must equal responsibility.
4. Determination of the relationship between the individuals in the organization.

**III. The directing function**
The main aim of this function is to make union of the individual’s effort towards achieving the objectives of the organization. Directing needs three main requirements:

1. **Communications (Guiding):** The aim is to enable the chairman’s to inform the individuals about their duties, responsibilities and at the same time inform their chairman’s about their reaction.

2. **Leading** means ability to affect the individuals in the way which help them to achieve the objectives of the organization, this requires the following forces of the leader:
   a. Position
   b. Experience
   c. Personality
   d. Punish
   e. Reward

3. **Motivating** which enable the leader in enhancing the individuals to achieve the objectives of their organization, this requires that leader must know the nature of individuals under his authority to choose the suitable reward for each subject.

**IV. The control function**

**Definition**
Control is the task of ensuring that activities are providing the desired results. Control involves setting objectives, measuring performance and taking corrective action.

**Prerequisites of control system:**
1. Control requires plans.
2. Control requires organization structure.

**Types of control**

*There are three types of control system*
- **Precontrol:** Control that takes place before work.
- **Concurrent control:** Control that takes place as work is being performed is called concurrent control.
- **Feedback control:** Control that concentrates on past organizational performance is called feedback control.

**Requirements for adequate controls:**
1. Controls should be tailored to plans and positions.
2. Controls must be tailored to individual managers.
3. Controls should be objective.
4. Controls should be flexible.
5. Controls should be economical.
6. Controls should lead to corrective action.

**N.B.**
The outputs of the controlling are a group of reports helps decision makers to take a group of correction procedures to avoid differences between the actual and planned performance.

**Administration levels**
1. First –line management (Supervisory level)
The first line managers are those at the operating level, they include the majority of the management staff. They are the lowest level of management. They are responsible for the management of their specific work groups and the accomplishment of the actual work of the organization. They concentrate on the technical details, work quality, work quantity and the employee’s performance. They include supervisors, foreman, and head of department or unit director. They spent most of their time in directing and need technical skills to do their task.

2. Middle management
Middle management includes all managers below the rank of vice president but above the supervisory level, and includes less number of management staff. They are responsible for implementing strategies, policies, objective and procedures. They include general director, head of departments or unit’s director. They spent most of their time in organizing and need interpersonal skills to do their task.

3. Top management
Top management includes all managers who are responsible for the overall operations of any organizations and include very few number of management staff. They are responsible for establishment of organization objectives, policies, strategies and they also represent the organization in the outside community. They include president of the organization, vice president of the organization and board of directors. They spent most of time with other managers in the organization in order to achieve the stated goals effectively and efficiently. They concentrate on planning and need conceptual skills to do their task.

N.B.
All the managers at all levels need the managerial skills (The four functions of the management are needed for the managers in all
management levels) but the degree of concentration and need of management functions are different from one level to other one.

Management skills
1. **Technical skills:**
   Technical skills are the skills necessary to accomplish specialized activities. Technical skills especially important for first–line managers who spend much of their time training subordinates and answering questions about work-related problems.

2. **Interpersonal skills:**
   Interpersonal skills sometimes called human skills. The interpersonal or human skills refer to the ability to communicate, motivate and lead individuals and groups.

3. **Conceptual skills:**
   Conceptual skills depend on the manager’s ability to think in the abstract. Also, refer to the ability to plan, coordinate and integrate all organizations interest and activities. It is the most important at the upper level of the organization where long-range forecasting and planning are the principal activities.

4. **Diagnostic skills:**
   Is the ability to analyze the symptoms and determine the cause of any problem.

5. **Analytical skills:**
   It is similar to decision making skills. It means managers ability to identify the variable in the situation, how they are interrelated and decide which ones should receive the most attention.

**Evaluation of administration performance**
Manager’s performance can be measured by two criteria:
1. **Effectiveness**: Is defined as doing the right things.
2. **Efficiency**: Means obtain the goal with the least cost (concerned with how resources as money, time, equipment and personnel are used to get the desired results).

<table>
<thead>
<tr>
<th></th>
<th>Efficient</th>
<th>Not efficient</th>
</tr>
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<tbody>
<tr>
<td>Effective</td>
<td>Obtain goals With least costs</td>
<td>Obtain goals with excess costs</td>
</tr>
<tr>
<td>Not effective</td>
<td>Didn’t obtain goals with least costs</td>
<td>Didn’t obtain goals with excess costs</td>
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</tbody>
</table>

**N.B.**
- Any manager can be effective but efficient.
- Manager can produce more than the stated standard (in this case he or she is effective) but for achieving this performance level he or she spend much of the resources (not efficient).
Managerial roles

Researches indicated that the managerial roles can be classified into three main groups, these are:

I. Informational roles:

It includes all the roles that are related to receiving, communicating and distribution of information inside and outside the organization.

Examples:

1. The monitor role: It is the process of receiving and presenting the information.
2. The disseminator role: It is the process of sharing and distributing the information among all the organization units.
3. The company spots person role: According to this role, managers transmit information to others especially those outside the organization.

II. Interpersonal roles:

The interpersonal roles are those that are related to establishing and maintaining a strong relationship with others whether they are inside or outside the organization.

Examples:

1. The figurehead role: This role reflects the managers responsibility for representing the organization in any meeting or ceremonial occasion.
2. Leadership role: This role involves the responsibility for directing and coordinating the activities the subordinates to accomplish the organizational objectives.
III. Decisional roles:

Perhaps this is the most important role as managers play a key part in the decision making system of an organization.

Examples:

1. The entrepreneurial role: This role involves the design and initiation of planned change.
2. The disturbance-handler role: This role is played when managers deal with involuntary situations and changes that are sometimes beyond their immediate control such as strikes by labor.
The system approach

This approach considers the organization or the project as a one unit has a specific goal, in order to attain this goal different component constituting the organization must interact with each other.

The manager has to look to his organization as an integrated unit from a big organization that named external environment; this means manger cannot achieve the goals of his department except through the goals of other departments, which participate in achieving the organization goals.

Work environment

Administration system for any organization according to the system approach
Communications

Communication means transmission of information, plans, ideas, feelings and suggestions, between individuals and receiving the reactions about them. Communication can be considered as the tool through which managers can achieve the goals of the organization.

Elements of communication

1. **Source**: Source is the person who has the idea, knowledge and message and can transmit it to others; he may be manager, head of department or supervisor.

2. **Message**: It is the information, which was prepared in order to be easily received by others.

3. **Channel**: It is the channel through which message will be transmitted from the source to the receiver; it may be visual or auditory (written as conferences, letters, annual reports or telephone).

4. **Receiver**: Receiver is the destination may be one or group of individuals. Receiver interprets the message and makes answer to the source.

![Diagram of Communication Elements](image-url)
Formal and informal communication

I. Formal communication

1. Downward communication:
   Communication started from any point above to another point of the administration committee. This type of communication helps in directing and control functions of management functions and transmits the philosophy and objectives of the organization.

2. Upward communication:
   Communication started from any point below to another point above of the administration committee. This type of communication helps in transmitting the information helps in evaluation of activities and tasks of directors to detect any defect in administration and ways of correction.

3. Lateral (horizontal) communication:
   Communication started from any point to another point at the same level of the administration committee. This type of communication helps in transmitting the information helps in coordination of activities between different departments.

II. Informal communication

This type of communication depends up on the personal relationships between staff in the organization and not related to the level in the administration committee.

Criteria of informal communication:
1. Not controlled with top managers.
2. Not organized.
3. Serve the personal benefits.

Communication barriers

1. Unsuitable message time.
2. Information overload in the massage.
3. Culture differences between the source and the receiver of the message.
4. Language barriers.
5. Loss of trust in others.
6. Bad massage design.
7. Differences in interpretation of the message due to differences in the educational level and technical experiences between the source and the receiver of the message.

**Methods help in obtaining effectiveness in communication**
1. Make idea of the message clear.
2. Select the suitable time for sending the message.
3. Follow up and make sure that message sent and received by receivers.
4. Make sure that receiver understand the desired meaning of the message.
Decision making and decision taking

Definition
Decision making can be defined as a rational choice among alternatives. Managers is responsible for decision taking.

Steps of decision making:
1. Define the situation and the problems.
2. Describe and collect needed information.
3. Develop alternatives.
4. Develop analysis of the alternatives
5. Detect the suitable alternative.
6. Develop implementation.
7. Denote the follow up.

Difference between decision making and decision taking
A. Decision making includes:
1. Define the situation and the problems.
2. Describe and collect needed information.
3. Develop alternatives.
4. Develop analysis of the alternatives
B. Decision taking includes:
1. Detect the suitable alternative.
2. Develop implementation.
3. Denote the follow up.

Types of decisions
1. Programmed decision: It is the routine frequent decision that depends on the usual policy, procedures and rules.
2. Non-programmed decisions: It is the decision that is taken for the first time or to solve unusual problem.

Mistakes can be happened during decision taking
1. Decision taking without referring to related information.
2. Decision taking without consultation of specialists.
Factors affect decision taking and making

1. Time: If time is available for decision taking and making is very limited and short, so steps of decision making and taking will be short and the risk will be high.

2. Risk: Risk is high when the expected results are not well known and its probability to come true is less than 100%.

3. Confirmation and acceptance of subordinates and managers.

4. Human skills of the managers as decision maker and his consideration of the effect of the external environment and time factor.
Setting of organization objectives

Definition
Objective is the end point or goal towards which management directs its effort and resources.

In order to obtain maximum effectiveness from a statement of objectives, an organization must state its objectives prior to initiating the management processes of planning, organizing, directing and controlling.

The values of objectives
1. Provide direction.
2. Serve as motivators.
3. Contribute to management process.
4. The basis for management philosophy.
5. Serve as a guide for organizational consistency.

Types of objectives in organizations
1. The organization objectives
   Organization objectives are the formal targets of the organization and are set to help the organization accomplish its purposes.
2. The individual objectives
   They are the personal goals of each organization members would like to reach through activity within the organization.
3. External objectives
   These include all the organizational objectives that are related to the people who have relationships with the organization and who are existing in the surrounding environment.
4. Internal objectives
   These objectives related to employee groups.

Establishing the organizational objectives
These are three main steps that managers must take to develop a set of working organizational objectives include:
1. Determine the existence of environmental trends.
2. Develop a set of objectives for the organization as a whole.
3. Develop a graduation for the organizational objectives.
Classes of Objectives

General characteristics of Objectives
1. Starts with the word “To”
2. Specifies a single measurable result
3. Specifies a target date or time span for Completion
4. Must be realistic and attainable, but represents a significant challenge.

N.B.

Goals and Objectives
Goals — broad, long-range attributes to be accomplished.
Objectives — more detailed, specific targets of performance.
Business planning goals

A Goal is the desired future state of the organization.

Goal Setting:
- Only 5% of the people in the country write down their goals.
- About 20% have goals but don’t regularly clarify and consciously commit to them.
- About 25% have vague (not clear) goals.
- And 50% don’t really know what goals are.

Type of goals
1. Strategic goals
   Broad statements describing where the organization wants to be in the future.

2. Tactical Goals
   Define specific results for major divisions and departments within the organization to achieve.

3. Operational Goals
   Define specific results expected from departments, work groups, and individuals.

Characteristics of Good Goals
- Written in terms of outcomes rather than actions
- Measurable and quantifiable
- Clear as to a time frame
- Challenging yet attainable
- Written down
- Communicated to all organizational members

Broad guidelines for effective setting of goals:
✓ State each goal as a Positive Statement
✓ Be Precise
✓ Set Priorities
✓ Write goals down to avoid confusion and give them more force
✓ Keep Operational Goals Small
✓ Set Performance, not Outcome Goal
✓ Set Specific Goals
✓ Set Realistic Goals
Deciding your lifetime goals:

1. Career
What level do you want to reach in your career?

2. Education
Is there any knowledge you want to acquire in particular? What information and skills will you need to achieve other goals?

3. Family
Do you want to be a parent? If so, how are you going to be a good parent? How do you want to be seen by a partner or by members of your extended family?

4. Financial
How much do you want to earn by what stage?

5. Physical
Are there any athletic goals you want to achieve, or do you want good health deep into old age? What steps are you going to take to achieve this?

6. Pleasure
How do you want to enjoy yourself? - You should ensure that some of your life is for you.

7. Public Service
Do you want to make the world a better place by your existence? If so, how?

8. Social
Do you have any social ambitions?

Goals and Objectives should be SMART
S Specific
M Measurable
A Achievable
R Reviewed (realistic)
T Target Oriented (Time bound)

Steps of goal setting process:
1. Review the organizational vision and mission(s)
2. Evaluate available resources
3. Determine broad, long-term, organization-wide goals
4. Write down the organization-wide goals
5. Determine specific, short-term operational goals
6. Write down the operational goals
7. Review results
Authority

Definition
Authority is the right to make decisions, the right to direct the work of others and the right to give orders.

Sources of authority
1. The person’s position or rank.
2. Personal characteristics such as charisma, knowledge and experiences.

Types of authority
1. Line authority
Line managers like the president, production manager and foreman are authorized to issue orders to their subordinates.
2. Staff authority
Staff authority gives advices, consultations and help for line authority.
3. Functional authority
Functional authority is authorized to issue orders for subordinates of their organization but in units not under direct control. Functional authority is given for certain fields and for limited time.
Example: Managers of financial affairs can issue orders for subordinates in other department not under its direct authority in order to gain information that helps the functional authority to do its work in the organization.

Authority delegation

Definition
It means pushing down of the authority from superior to subordinate. While, authority can be delegated responsibility can not.

Barriers in delegation
1. Some managers are hesitated (reluctant) to delegate authority and some subordinates try to avoid having authority delegated to them.
2. Some managers get trapped in the lake of confidence in his subordinates (I can do it better by myself).
3. Some managers lack the ability to direct their subordinates.
Responsibility

Definition
Responsibility means making someone responsible for doing something; it cannot be delegated to others.

Fields of responsibility

I. Job description
It is a list of activities that should be achieved; it includes the following steps that can be done by the management committee:
1. Examination of the organizational objectives.
2. Detection and design of activities required to achieve the organizational objectives.
3. Determination of the specific tasks required for each activity.
4. Selection and determination of individuals for each activity.

II. Detection of the manager’s administrational activities.

III. Managers should carry their responsibilities that can be measured by analysis of attitude with their subordinates and top managers.

Accountability

Definition
It is to make sure that responsible subjects did their work in a right way.

Prerequisites
1. Responsibilities should be clear for every one in the organization.
2. Subjects should be qualified and has enough experiences.
3. Subjects should have the responsibility to be responsible.

Methods of accountability
Accountability can be done by managers through:
1. Reviewing and inspection of subject activities and performance.
2. Documented reports that describe the performance of the subjects.
### Authority, responsibilities and duties of physician, physical therapist and head of department (chairman)

<table>
<thead>
<tr>
<th>Physician &amp; Therapist</th>
<th>Duties</th>
<th>Responsibilities</th>
<th>Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Treat the patient according to his speciality</td>
<td>1. He is responsible for patient health.</td>
<td>1. He is only subject has the right to detect patient treatment.</td>
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<tr>
<td></td>
<td>2. Prepare a written record about the plan of treatment.</td>
<td>2. He is responsible to the instrumentation errors due to disuse.</td>
<td>2. He can change patient treatment according to patient condition.</td>
</tr>
<tr>
<td></td>
<td>3. Use instrumentations in a good way.</td>
<td>3. He is responsible to any complication due to malpractice or mal diagnosis.</td>
<td>3. He is the only authorized subject who can operate the instrumentation.</td>
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<tr>
<td></td>
<td>4. Refer the patient to another physician or speciality if it is necessary.</td>
<td></td>
<td>If there is error in its use, physician can refer the instrument to the maintenance department.</td>
</tr>
<tr>
<td>Duties</td>
<td>Responsibilities</td>
<td>Authority</td>
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<tr>
<td>Head of department (chairman)</td>
<td>1. Problems and barrier facing work.</td>
<td>1. He is authorized to making subordinates to take training courses.</td>
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<td></td>
<td>2. Select the alternative solution according to the objects of the organization.</td>
<td>2. Can select the alternative, even it is not the best one from the</td>
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<tr>
<td></td>
<td>3. Decision taking of technical problems and follow up work in the department.</td>
<td>physician point of view.</td>
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<td></td>
<td></td>
<td>3. He can give or refuse to give holidays (days off) according to the work</td>
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<td></td>
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<td>needs and number of patients.</td>
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<td></td>
<td></td>
<td>4. He can give rewards for good member and punish bad subjects.</td>
<td></td>
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<tr>
<td>1. Held meeting for physician and subordinates to discuss their</td>
<td>1. Problems and barrier facing work.</td>
<td></td>
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<tr>
<td>problem and how to solve these problems.</td>
<td>2. Select the alternative solution according to the objects of the organization.</td>
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<tr>
<td>2. Select between the alternatives to select the best way to solve</td>
<td>3. Decision taking of technical problems and follow up work in the department.</td>
<td></td>
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<tr>
<td>work problems.</td>
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<tr>
<td>3. Take technical decision to coordinate and organize the work in the</td>
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<td>department.</td>
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<tr>
<td>4. Follow up work.</td>
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</table>
Leadership

Definition
Leadership means directing others to achieve certain objectives through affecting others behavior to do activities needed by the leader, leadership is not equal to management.

Differences between leadership and management
1. Leadership concentrates on influencing of humans behavior, where management means using of available resources (including human resources) to achieve certain objectives.
2. Leadership is only a directing function, where management includes four functions (planning, organizing, directing and control).
3. Management is more formal than leadership

N.B.
* Manager is a subject has position and authority.
* Leader is a subject depends upon his human skills and personality to affect behavior of others.

Types of leader
1. Autocratic leader: who inform his subordinates about what they must to do without asking question related to leaders decision.

2. Co-operative leader: Who give the chance for his subordinates to participate in steps of decision-making and maintain for him self the right in taking the final decision.

3. Democratic leader: Who take the decision of the majority of his subordinates.

Factors help in detection of leader type
A. Factors related to managers:
- Values and believes of managers.
- Level of manager’s confidence in his subordinates.
- Personality and human skills of the managers.
- Ability to be changed to depend on subordinates in the right time.

B. Factors related to the situation:
- Capacity and value of the organization.
- Effectiveness of the work group when they participate as teamwork in decision making.
- Problem that require decision making.
- Time available for decision making.

C. Factors related to Subordinates:
Leader has to understand the capabilities of his subordinates and to detect differences between subordinates. manager have to allow subordinates to participate in decision making in the following situations:
- If subordinates can carry extra responsibilities in decision making.
- Have the knowledge and experiences to deal with problems.
- Know the organizational objectives.
- Interested in finding decisions about work problems.
Co-ordination

Definition
Coordination is the process of achieving unity of action among interdependent activities. Coordination is essential whenever two or more interdependent individuals group or departments seek to achieve a common goal.

Principles of coordination
1. The first coordination technique is that a manager should implement are rules, targets and hierarchy, these are the simplest and most basic facilitators of coordination.
2. The more interdependent are the departments the more difficult is the task of coordinating them.
3. The more diverse are the interests, value and goals of the departments to be coordinated, the more difficult is the job of coordinating them.

Techniques for achieving coordination
1. Coordination by targets or goals.
2. Coordination through hierarchy.
3. Coordination through departmentalization.
4. Using a committee for coordination.
5. Coordination by rules or procedures.
Vision and Mission

**Vision:** An overall picture of where the entire organization would like to be in the future. Vision can be expressed in a short statement and slogan.

**A clearly defined vision:**
1. Provides direction
2. Determines decisions
3. Motivates people

**Vision of the organization:**
Vision of the organization means the future expectations from the organization in addition to objectives of the organization. Vision can be expressed in a short statement and slogan.

**Examples**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Vision (statement and slogan)</th>
</tr>
</thead>
<tbody>
<tr>
<td>جامعة الملك عبد العزيز</td>
<td>أقرأ باسم ربك</td>
</tr>
<tr>
<td>BMW</td>
<td>The ultimate driving machine.</td>
</tr>
<tr>
<td>قناة أقرأ الفضائية</td>
<td>متعلة الأعلام الهدف</td>
</tr>
</tbody>
</table>
Mission of the organization:

*Mission:* A statement of what the various organizational units do and what they hope to accomplish in alignment with the organizational vision. So, mission of the organization expresses the task, objectives and values of the organization in few short statements.

**Examples:**

I. BMW

*Mission, Vision, Values*

We support the sale of BMW Group products through financial products and services offered to consumers and to BMW centers and BMW Motorcycle centers throughout North America. In addition, we enhance the BMW customer relationship by offering comprehensive banking and insurance services tailored for the BMW driver.

Our values are very important to us because they shape the personality of our organization. They affect the way we work, the services and products we provide, and our support of our people and their communities.

**The core values of BMW Financial Services are:**

1. Uniqueness through diversity
2. Leadership
3. Teamwork
4. Involvement in community
5. Mutual respect
6. Associate growth & development
7. Taking risks
2. Mercedes-Benz Indonesia

Our Vision
To be Number 1 in Quality, Image and Profitability in the Automotive Sector in Indonesia

Our Mission
To delight our customers in everything we are doing.

1. To continually improve the effectiveness of our Quality Management System and our business processes.
2. To continually improve the quality of our products and services.
3. To have a team-oriented and open minded corporate culture involving employees through leadership and individual acceptance of delegated responsibility.
4. To be aware of our environment.
5. To have a professional relationship with our business partners.
Strategic planning

Definitions:

- A **strategy** is a unified, comprehensive and integrated plan
- **Strategic planning** is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.

Types of plans

1. **Strategic plans**: Plans that focus on the broad future of the organization and incorporate both external environment demands and internal resources into the actions managers need to take to achieve the long-term goals of the organization.
2. **Tactical plans**: Plans that translate strategic plans into specific goals for specific parts of the organization; they have shorter time-frames and are narrower in scope, typically affecting a single business unit within an organization.
3. **Operational plans**: Plans that translate tactical plans into specific goals for small units of the organization and focus on the near term.

An Overview to Strategic Planning for Decision Makers

**If you do not plan properly you may realize:**
- Higher costs
- Lack of coordination
- Confusion
- Internal competition
- Duplication
- Inefficiency
- Budget battles
- Lost opportunities

**Strategic planning provides**

- A direction, a framework, a vision
- Increases your chance of success
- Identifies upfront related functionality
- Is characterized by flexibility
Strategy is about developing understanding of
1. The present situation (Where are we now?),
2. The desired future position (Where do we want to be?)
3. The path to take the organization from its present position in future (How do we get there?)
4. Strategy is broad categories or types of action to achieve objectives.

Levels of strategy
1. Corporate strategy: The overall scope of an organization.
2. Business strategy: A strategic business unit (SBU) within the organization
3. Functional strategy: How each function contributes to the strategic vision, for example:
   - Finance: measuring performance and resource utilization.
   - Marketing: assessing customer needs and market feedback
   - Human resources: making the best use of people.

Outline strategic planning process
1. SWOT analysis:
   - Internal environment (strengths / weaknesses) analysis.
   - External environment (opportunity & threat) analysis.
2. Goal formulation
3. Strategy formulation
   - Generate strategic options
   - Evaluate strategic options (against targets & internal/external threats).
   - Take strategic decision
4. Program formulation
5. Strategy implementation
   - Draw up action plans and budgets and Monitor & control.
6. Feed back and control

Advantages and disadvantages of strategic planning
A. Advantages of strategic planning:
1. Co-ordination of work
2. Long term thinking
3. Control
4. Rational management

**B. Disadvantages of strategic planning:**
1. Uncertainty of forecasting
2. Assumptions
3. Rigidity
4. Creates opposition to change

**The rules of strategic process**

There are five rules that any strategic process should follow if it is to be successful:
- There should be a formal strategic planning process.
- The strategy team should be championed by the leader of the organization and the top executives.
- The strategy should be communicated to staff and customers.
- The strategy should be continuously probed and tested.
- The strategy should enable managers to think strategically.

**Criteria of good strategic plan**

1. **Feasible:** Does the organization have the resources to carry out the plan?
2. **Measurable:** Are the goals specific enough that you will know when you have achieved them?
3. **Time specific:** Is the plan translated into comprehensible time lines and time-specific work plans with clear deadlines?
4. **Flexible:** Have you scheduled regular review sessions for assessment and revision?
5. **Inspiring:** Does the plan give people a sense of something worth working for? Is it bold and imaginative?
6. **In writing:** If the plan isn’t in writing, you might as well not have a plan because everyone will have a different idea of what the plan is.

**Benefits of strategic planning**

Strategic planning can be used to determine:
- Mission
- Vision
- Values
- Goals and objectives
- Roles and responsibilities
- Timelines, etc.
Staffing

Definition:

The staffing function can be viewed as consisting of a series of steps that managers perform to provide the organization with the right people in the right positions.

The staffing process:

There are eight steps for developing the staffing process. These steps are:

1. **Human resource planning:** The purpose of human resource planning is to ensure that the personnel needs of the organization will be met.

2. **Recruitment:** They may accomplish it through newspaper and professional journal advertisements, employment agencies.

3. **Selection:** The selection process involves evaluating the candidates and choosing the one whose credentials match job requirements.

4. **Introduction and orientation:** This step integrates the selected employee into the organization.

5. **Training and development.**

6. **Performance appraisal.**

7. **Employment decisions:** rewards, promotions, demotions.

8. **Separation**

Sources of applicants:

There are two sources of applicants, internal and external. Internal sources are the employees of the organizations have policies of promoting from within. This has a positive impact on the organizational members and the internal working environment. A second potential source for candidates is outside organization. Organizations can develop programs using on-visits to colleges, trade schools.

Recruitment and selection

The different procedural steps involved in the selection process are:

1. **Job description:**

   A job description is a combination of short statements that describe both the work to be performed and the essential requirements of the particular jobs.

   **The job description includes:**

   a. **Job title.**
b. Department in which the job exists.
c. Work to be performed by the new employee.
d. Job responsibilities.
e. Machines, tools and processes to be handled.
f. Relation with other jobs.
g. Qualification and experience required.
h. Physical activities.
i. Working conditions.

2. Application form:
   An application blank or form is the most universal mechanism used to screen the applicants to be called for interview and other tests for selection purposes.

3. Employment tests:
   Very often considerable training and money is expended upon an employee when it is discovered that he is unsuited to do the job for which he was employed. For this reason, and in order to avoid the recurrence of such a situation, employment tests are, sometimes, considered an essential part of the selection programme. An employment test measures selected psychological factors such as ability to reason, capacity for learning, physical or motor abilities etc.

**Characteristics of employment tests are as follows:**
   a. A test should be designed on the basis of a sound job analysis programme.
   b. The test should be reliable (an applicant if tested even second or third time under the same condition should achieve the same score).
   c. The test should be valid (highly specific to the objective it intends to measure and to the particular business situation).

**Types of employment tests:**
   a. Achievement tests.
   b. Intelligence tests.
   c. Interest tests.
   d. Motor tests.
   e. Personality tests.
4. **Interviewing:**

An interview is a conversation directed to a definite purpose between an applicant and the interviewer and a much of the interaction between these two is carried on by gestures, postures, facial expressions and other communicative behavior. It is in the interview that both the prospective employee and employer get the chance to learn and know about each other.

**Purpose of Interview:**

a. To find the most suitable candidate for the job.
b. To view and appraise the applicant in totality.
c. To study the applicant's motivational and emotional pattern.
d. To explore the applicant's innate abilities.
e. To study the impact of the applicant's personality upon others.

**Types of Interviews:**

a. Guided interview: A list of questions is prepared based on an analysis of the job specifications. This type of interview measures the personality traits as self-reliance, emotional stability, ability to get along with others, willingness to shoulder responsibility etc.
b. Unguided interview: It is not directed by the interviewer, instead the applicant talks about what he chooses. Unguided interview is more often used in situations other than employment, e.g., counseling, handling grievances etc.

5. **Physical Examination:**

Physical examination or medical check-up has to be carried out for the freshly recruited people. As it denotes the physical wellbeing of an employee.

**Physical Examination has at least three objectives:**

a. To confirm the applicant’s ability to meet the job requirements.
b. It serves to protect the organization against the unwarranted claims under Workman’s Compensation Act or against lawsuits for damages.
c. It helps to prevent communicable diseases entering the organization.

**N.B.**

The physical examination should be done by a qualified expert appointed by the organization to certify whether the candidate is physically fit to meet the requirements of the job.

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Total Quality Management (TQM)

Definition

Total quality management refers to meeting the requirements of customers consistently by continuous improvement in the quality of work of all employees.

For achieving total quality, three things are essential:
1. Meeting customers requirements.
2. Continuous improvement through management process.
3. Involvement of all employees.

Total quality management is a dynamic concept as the quality standards don’t remain the same for ever. They are to be modified or changed to meet the requirements of customers and to make use of new technology. Even the ISO:9000 series standards have a provision of revision, modification or deletion of quality standards after every five years. Without the active involvement of employees, high quality standards cannot be achieved. Further, the whole concept to TQM is directed towards meeting the requirements of customers.

Elements of TQM

There are three essential elements of TQM which are discussed below:

1. Meeting customer requirements: TQM aims at satisfying the requirements of customers, which never remain constant but keep on changing with time, environments, circumstances, needs, fashion, etc. Thus, meeting the changed requirements of customers is a continuous goal of the producer.

2. Continuous improvement: The change in customer requirements may be in terms of desire for better quality products/services, bigger size, reduced cost, etc. A product has to cope up with new requirements. A new process may have to be developed, or it may require a new design. The production process has also to take care of competition in the market so that customers don’t shift to other producers.
3. **Empowerment of employees:** The enhancement of skills of employees will not only improve quality but also bring down the cost of production through efficient use of machine and materials and reduction of wastages. The employees must also be conscious about the need for improvement in the quality of work.

**N.B.**

TQM should be the concern of all managers and workers in the organization if it is to serve its purpose fully. Each and every employee must be encouraged to become involved in implementing the TQM programme. TQM is a philosophy that calls for development of a company-wide culture for quality. A positive attitude towards customer and continuous enhancement of quality must be ingrained in the minds of the employees.
Management By Objectives (MBO)

Management by objectives can be described as a process whereby the superior and subordinate managers of an organization jointly identify its common goals, define each individual’s major areas of responsibility in terms of results expected from them, and use these measures as a guides for operating the unit and assessing the contribution of each of its members.

Benefits of MBO:

a. It causes improvement in productivity due to the fact that management concentrates on the important tasks of reducing the cost and make use of opportunities rather than less important matters.
b. It develops a greater sense of identification.
c. It improves communication and organization structure which helps in locating weak and problem areas.
d. It serves as a device for organization control and integration.
e. It stimulates the subordinate’s motivation.

Setting of objectives

The following activities are concerned with the setting of objectives

1. Revision of organization structure:
   When the goals for each individual are reset under MBO there is a considerable change in the job description of various positions. This may call for revision of the existing organization structure. The job description of various jobs must be defined with their objectives, responsibilities and authorities. They must clearly lay down the relationship with other job positions in the organization.

2. Establishing checkpoints:
   Management by objectives ensure periodic meetings between the superior and the subordinate to review the progress towards the accomplishment of targets of the subordinate. For this, the superior must establish checkpoints as standards of performance for evaluating the progress of the subordinates. The standards should be defined quantitatively as far as possible and the subordinate must understand them fully.
The key result analysis should contain the following information;

- The overall objectives of the subordinate’s job.
- The key results he must achieve to fulfill his objectives.
- The long and short term priorities of tasks he must adhere to.
- The standards by which his performance shall be evaluated.

3. Appraisal of performance:

   While informal performance appraisal of a subordinate is done by his immediate superior almost everyday, formal appraisal at periodic interval, usually once or twice a year.

Limitations of MBO

A. Poor planning: There may be poor planning of the program prior to implementation.

B. Lack of training: There is generally a lack of training and knowledge on the part of the supervisor in implementing the programme.

C. Lack of follow-up: Lack of follow-up by the supervisor at the appropriate time.

D. Inflexibility: Since goals are set in every six months or one year, the superior may not like to modify them in between because of fear of resistance from the subordinate.

Making MBO effective:

1. Top management support: The active participation of top management is essential for MBO implementation. If the top managers use the objective as an instrument for managing, this practice will also be followed down in the organization.

2. Education about MBO: The organizational members must be adequately educated about the philosophy of MBO.

3. Active participation in goal setting: There should be a face communication between the superior and subordinate in setting the goals, discussing the subordinate’s problems and resetting the goals, and reviewing his performance. Thus, there must be an effective two-way communication in the organization.

4. Decentralization of authority: MBO will not work if the manager is not be willing to delegate sufficient authority to the subordinates as the subordinates will not be will not be willing to accept new assignments without having authority and may even resist the setting of clearly defined goals.
Documentation

Introduction

Documentation refers to a health care provider’s written summary of his or her interaction with a patient. However, proper documentation also will record information relating to the time period before the patient presents to the provider: the patient’s history and physical examination. So, documentation is a health care provider’s comprehensive written summary of his or her interaction with a patient throughout the treatment period. Proper documentation will support the rationale for the proposed treatment, the medical necessity of treatment, and the appropriateness of the intervention. It is the foundation of communication with patients, other providers and third party payers.

The reasons for documentation:
1. To communicate your methods to other practitioners in your field who might encounter your patient.
2. To represent your work to your employers or to outside assessors.
3. To protect you from malpractice suits.
4. It indicates your procedures and methods as they are measured by the standards set forth your practice or health care organization.
5. To legally protect yourself from health maintenance organizations or insurance companies.
6. It can be used for academic purposes such as data gathering for particular research project.
7. It reflects your professional qualifications and ability to communicate with others.

Preparing the document
1. Attention to the details of writing well governs your success.
2. Spend the necessary time to assure your self that your message is clearly communicated.
3. Fill out forms, which suggest that the information you provide should be easily managed.
4. Place the information is logical and chronological sequence.
5. Providing precise wording requires that you know the language of your profession.
6. Developing a strong grasp of medical terminology helps you be precise in your documentation. In other cases, using the patient’s words in quotation marks can be helpful in clarifying the condition described.

**Documentation support claims for reimbursement**

Documentation provides the best evidence that a provider has rendered the correct treatment at the right time, at the proper level of intensity and in the most appropriate setting. If these goals have been achieved this means that the ultimate goal of providing quality health care to your patient have been attained. So, proper documentation show that you provided quality care to your patients and support your request for reimbursement, this is important in today’s health care industry in which most patients don’t pay you directly for your services, payment often comes from third party payer.

Since the third party payer was not present in your office when you treated the patient, your documentation will need to explain what you did, why did it, how the patient benefited, any why your bill should be paid. If your documentation is not accurate, complete, descriptive and legible, the third party payer will not have enough information to process and pay your claim, even if you performed the services.

Documentation is often the first communication between you and a payer, it is often the first document a payer will examine when deciding whether to pay for services you have provided. Therefore, you should be mindful that the quality of the documentation you submit will give a payer a first impression of your approach to patient care. To make a good first impression; your documentation should be accurate, complete, truthful, descriptive and legible and follow a logical progression.

A provider should keep in mind that the thoroughness of his or her documentation is ultimately determined by the party paying for the medical procedures, not the provider. So, a provider should document that the proposed treatment satisfies the payer’s minimum requirements for reimbursement. Failure to submit documentation that meets a payer’s minimum requirements may result in a delay in reimbursement for the service or a denial because there is no enough objective evidence to indicate that the patient needs the proposed intervention.
Utilization review is generally a payer’s review of a provider’s use of resources in treating his or her patients. Utilization review may also take the form of concurrent review, a review of the utilization of health care services during a patient’s hospital stay or a retrospective review an audit of services that were previously provided. On a retrospective review, a payer may request patient charts and written documentation for support of services that were already performed, billed and paid for by the payer, such as a review of medical emergency services that were already provided. In performing utilization review, the payer will generally look for the documentation to support two elements: (1) The treatment was indicated by the patient’s condition and (2) The treatment was actually performed.

N.B.
A provider who regularly submits claims to the government without appropriate documentation may quickly find himself or herself potentially liable for millions of dollars in fines and subject to countless years in prison.

Types of documentation

1. Notes
Notes are usually brief information, presented in an organized format that defined your treatment procedures and the patient’s evaluation and progress. Write your notes as close as possible to the time of communicating with the patient to avoid information loss.

A. SOAP Notes
S: Subjective
O: Objective
A: Assessment
P: Plan

These headings allow your patient information to be presented in an orderly and organized fashion for easy reference by you, support staff or colleagues.

B. Narrative method
Narrative simply tells the story of the patient in a chronological order instead of limiting yourself with a restrictive SOAP notes. Narrative method
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requires more time to write in addition to the need to write more than necessary.

2. Initial evaluation

   The initial evaluation provides the blue-print for your rationale for treatment as you review the patient condition. It includes the following items:
   - Patient identification information.
   - Referral information.
   - Evaluation.
   - Diagnosis.
   - Treatment plan.

3. Progress report

   A progress report documents the continuity of care provided over a specific period of time. This amount of time may be a few days, a week a month or longer depending on the patient. Additionally, the progress report supports the practitioner’s need to carry on further treatment. The purpose of all progress reports should be clear to establish the medical necessity of continued care. It includes the following items:
   - Patient information.
   - Current evaluation.
   - Diagnosis.
   - Treatment provided.
   - Assessment.
   - Complications or further development.
   - Recommendations, changes to treatment and goals.

4. Discharge report

   A discharge report describes the success of the treatment provided and clears the patient to return to living, and in some cases, with limitations or restrictions. The discharge report includes the same items presented in the progress report.