



AAMI's Leadership Development Guide

A Resource for Healthcare Technology
Management Professionals

PREPARED BY AAMI'S
Job Descriptions Task Force

About AAMI

AAMI is a diverse alliance of nearly 7,000 members from all around the world united by one critical mission—supporting the healthcare community in the development, management, and use of safe and effective medical technology.

AAMI serves as a convener of diverse groups of committed professionals who share one common goal—improving patient outcomes. AAMI also produces expert and objective information on healthcare technology and related processes and issues. AAMI is not an advocacy organization and prides itself on the objectivity of its work.

About AAMI's Technology Management Council

AAMI's Technology Management Council (TMC) represents biomedical equipment technicians (BMETs), clinical engineers, and other professionals who manage and service healthcare technology around the world. The TMC creates new networking opportunities; advances and promotes the healthcare technology management (HTM) field to others in healthcare and the public at large; and develops new career and technical resources for professionals in the field. AAMI's Job Descriptions Task Force—which developed this document—is a task force of the TMC.

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Overview

Introduction

Welcome to *AAMI's Leadership Development Guide*. Being promoted from an individual contributor role to being in charge of other staff can be a daunting career move. Leading others can be challenging; not only do you need to be concerned about your own performance, you also need to coach and guide other employees. The rewards of supervision and leadership outweigh the additional effort when you consider how much more you will get done and how much more your work, directing others, will benefit your organization.

Purpose of the Guide

AAMI's goal in creating *AAMI's Leadership Development Guide* is to provide the healthcare technology management (HTM) professional with the information you need to advance your career into a leadership position. The information in this guide is designed to inspire advancement from initial steps into team leadership and through to the senior leader levels in your organization.

HTM professionals sometimes view their value to their organization solely in terms of their technical and engineering abilities. They may be reluctant to apply for managerial positions, feeling that their training and expertise only addresses technical competence. The purpose of this guide is to provide guidance on how to grow the skills needed for leadership positions, such as communication and business acumen. Used in conjunction with your organization's career development resources, *AAMI's Leadership Development Guide* can be used as a navigation tool for your career path into leadership.

How to Use the Guide

AAMI's Leadership Development Guide has been written to cover advancement through all levels of leadership, from team lead and supervisor through senior level positions, in both clinical and manufacturing organizations. The guide contains general guidelines, meant to be applicable to all organizations that employ HTM professionals. The guide can be used to supplement the specific position descriptions and job requirements for your particular employer. Share this guide with your organization's leadership, both on the operations side and Human Resources (HR), so that you can work in partnership with your management on your career advancement.

It is our hope that use of *AAMI's Leadership Development Guide* will result in the advancement of many more HTM professionals into leadership roles in their organizations. HTM leaders not only will advance their own careers and increase their impact on their organizations, but also will raise the visibility of the HTM profession in the healthcare community.

Note for HTM Leaders

If you are already an HTM leader, you can use *AAMI's Leadership Development Guide* to advance high-potential employees into leadership positions. You can work in partnership with your staff to create Personal Development Plans containing special projects and stretch assignments that will broaden their leadership skills on the job. Expanding their skills and experience increases their value to your organization, while forward-focused development plans serve as a powerful retention tool. Leaders should ensure that all employees have development plans. Growing future leaders through meaningful development assignments builds bench strength for succession planning and creates a positive and rewarding work climate.

Background History of Project

- June 2011—AAMI launches the Core Competencies Committee, whose charter is to review all of the topics covered in the curricula of BMET training programs and to generate a set of core educational objectives.
- June 2012—The Core Competencies document is reviewed and approved at the AAMI annual conference.
- August 2013—AAMI initiates a project to develop standard career progressions to provide BMETs and BTE with a detailed resource for professional growth and opportunities.
- Fall 2014—AAMI publishes *AAMI's Career Planning Handbook* and *AAMI's Leadership Development Guide*.

Content Overview

AAMI's Leadership Development Guide contains the following sections:

- **Getting Started**—a step-by-step process to create your career plan
- **Toolkit**—HTM career progressions graphic and HTM leadership progression grid along with planning worksheets
- **Career Planning**—specific sources of development opportunities for each of the skill and knowledge domains on the HTM leadership progression grid
- **Communicating Your Plans**—meeting guidelines and sample agendas for communicating your career goals and plans with your organizational leadership and Human Resources (HR) department
- **Interviewing for Leadership Positions**—tips and techniques for senior level interviewing
- **FAQs**—answers to the most frequently asked questions about career planning

Getting Started

The Process

Using a systematic process to plan your long-term career path is the best way to ensure that your goals will be achieved. This section contains a six-step process that you can use to create career goals and a Personal Development Plan that will guide you to attaining the skills and experience needed to advance into leadership positions.

Step	Definition
Step 1: Determine Your Goals	Identify short- and long-term career goals that are achievable with your overall goals and strategies
Step 2: Identify Your Needs	Identify what skills, knowledge, and expertise are needed for the desired future position
Step 3: Assess Your Current State	Assess your current skills, knowledge, and expertise
Step 4: Identify Gaps	Identify gaps that require development
Step 5: Create the Plan	Create your Personal Development Plan
Step 6: Work the Plan	Work the plan, adjusting as needed to changing conditions

This section is designed to be a self-help guide for career planning. You can work through these six steps and share the resulting goals and Personal Development Plan with your organizational leaders and/or HR department. They can then provide the coaching, guidance, and support necessary to help you achieve your goals.

Step 1: Determine Your Goals

Where do you want to be in 3 to 5 years?

The answer to this question is the outcome of the first step of career planning. By far, it is the most critical step. Few professionals have a clear sense of their future goals. Most spend time and attention on annual or quarterly achievements, letting the future emerge as an accumulation of short accomplishments. This may be a successful strategy for some, but for others the result is waking up one morning and asking, “How the heck did I get myself in this job rut?” Without a career goal, you are at risk of evolving your job into a series of assignments that fall into your lap, and that can be dull dead ends.

Start the research into career goals by asking yourself:

- What motivates me at work?
- What makes me look forward to Mondays?
- What tasks, activities, and people make me feel like my work has value?

Then ask yourself:

- What do I dislike about my work?
- What makes me feel like I have no energy?
- What do I dread doing?
- With whom do I dislike working?
- What makes me wish it was Friday?

The answers to these questions will tell you the work and work environment in which you need to be. The reflection also prevents you from being swayed by a job title or place on the organizational chart, and paints a clear picture of a motivational goal on which to set your plan.

If you are looking to move into supervision or into higher levels of management, you need to take a critical look at how much you thrive on the work you currently perform as an individual contributor. As you advance through the ranks of management, your individual work will be reduced and replaced with tasks that support managing others. If directing the work of others excites and motivates you, look to advancing your career by progressively increasing the number of people and the size of the organizational unit you manage. On the other hand, if you find yourself resenting the time you need to coach and guide others, you may want to advance your career as an individual contributor to more senior levels of technical specialty. (See *AAMI's Career Planning Handbook* for career progressions and developmental opportunities for HTM technical specialists and clinical engineers.)

Examples of career goals:

- Obtain a promotion to an HTM team lead based on my specialty in XYZ technology.
- Complete a BA in Business Administration and obtain position as an HTM department manager.

Outcome of Step 1:

A clear, concise, measurable statement of your future career goal with a set time frame to achieve that goal.

Step 2: Identify Your Needs

What skills, knowledge, or experience do you need to achieve your career goals?

What does your future position require for you to be perceived as a good candidate for a leadership position? Knowing what you will need to qualify for career advancement is the next step in determining how ready you are to make the move. This step encompasses all of the research you need to gain intelligence on your readiness for the move as well as what you will need to do to fill any gaps.

Most job descriptions or job advertisements do a decent job of describing the technical requirements. They will tell you what knowledge you need and the experience that is desired. What they won't tell you is the most critical aspects of the job: the things you have already identified as issues that motivate or drain you on a daily basis. Job documentation will not tell you if the staff need high levels of supervision or if they need to be empowered and left alone. They won't tell you the senior leaders' expectations for performance and whether they promote learning or growth. You need to know these factors, along with the ones you have already identified in Step 1, before you seriously consider moving into a new position.

How do you find this information out? By carefully asking questions, not only of the hiring managers, but also from direct reports and peers. You need to network in the professional community, read a company's website, and use any other trick that comes to mind, to ferret out the information not covered in the job posting or job description.

Outcome of Step 2:

A complete inventory of what is needed to qualify for your next move. You will identify not only the technical requirements but also the sometimes undocumented interpersonal and managerial attributes needed for success in the position.

Step 3: Assess Your Current State

What are my skills, knowledge, and expertise?

The primary goal of this step is to gain a full and complete inventory of what you currently know, your strengths, and the areas that you need to develop. Most people have a reasonably good grasp on their technical qualifications. What you also need to know is how well you work with others, your leadership style, and your strategy and visioning skills. All of these tell the complete picture of who you are as a leader.

Some useful resources for research may be:

- Performance reviews
- Interpersonal assessments such as Myers-Briggs Type Indicator, DiSC
- 360-degree feedback
- Feedback from others such as customer feedback or customer satisfaction data
- Project status reports or debriefs
- Training records, certifications
- Educational transcripts

Outcome of Step 3:

A complete inventory of what you are taking into your career plan as a baseline.

Step 4: Identify Gaps

What is missing? What do I need to learn, do, and achieve to be ready for my next move?

In this step, you will use the outcomes from Step 2 (your future needs) and Step 3 (your current assets) to determine the development and experience gaps that you need to address in your Personal Development Plan.

Outcome of Step 4:

A list of the career and learning gaps you need to close to be ready for your next career move.

Step 5: Create the Plan

What are my immediate goals and the development activities and assignments I need to achieve them?

Most development plans are little more than laundry lists of activities. “Attend a conference.” “Take a class in . . .” These plans serve as a to-do list for learning but they may or may not focus the learning toward the desired end goal. This is especially true for gaining experience in leadership competencies. Leadership attributes such as giving feedback and building effective teams develop much more through experiential, hands-on activities than from reading books or taking classes.

Start to build your plan by clearly stating the goal that you are trying to achieve. Then list those activities and actions that support the goal. Goal-focused plans are built on targeted actions designed to reach an end, not just act as a checklist of things to do.

Every activity listed needs a statement of results or outcomes. What will completing this activity do for you? Will it build a specific type of experience? Add to your knowledge base on a subject? What are you hoping to learn by doing this? If you are struggling to define a concrete result for the action, you probably should not be doing it.

Clear result statements also let you evaluate the quality of the activity. For example, if you were given a stretch assignment to lead a cross-department task force that is designed to give you experience leading a diverse team to a collaborative solution, were you able to achieve that goal? Successful evaluation of the development activities can then be used to update your skills inventory built in Step 3.

Finally, add the time and cost estimates associated with the developmental activity. These factors, in combination with the rest of the information on the plan, will allow you to prioritize your activities. Prioritizing the Personal Development Plan will allow you to determine if there are any barriers to completing activities. For instance, if you list the desire to serve as acting department head during your boss’ absence in the next six months, and also list the desire to obtain a challenging certification which will require extra hours per week of study and classes, you may decide to postpone the certification until after your temporary leadership assignment is finished. Available time and budget dollars may require you to carefully schedule the sequence of activities you have on your plan.

Outcome of Step 5:

A clearly-defined, realistic Personal Development Plan.

Step 6: Work the Plan

What do I need to do to ensure that I am accomplishing what I set out to do in my Personal Development Plan?

Having a Personal Development Plan is a critical start to proactively managing your career. Working the plan is the next essential step. Investing time and money in learning is investing in your future.

There are various ways to obtain knowledge, skills, and experience beyond formal academic degree programs. You can attend courses and workshops offered by your local college or university. You can also learn through online resources and webinars. You can gain valuable experience by seeking on-the-job training through new assignments or by signing up for a mentor if your organization has such a program. On-the-job training, also called experiential learning, is a valuable and often overlooked way to gain good professional experience.

Experiential learning is essentially learning by doing. For example, if you want to hone your expertise in project management, look to take the lead on managing a small project that will take you through all of the project steps from inception to completion. If you want to increase your negotiation skills, look for a situation that would allow you to work in contracting or procurement.

Learning by doing is a very powerful way to gain expertise. By actually performing the skills you wish to learn, you gain firsthand experience of what works and what fails to work. You can examine your behaviors and actions and see what helps lead you to success and what you might need to change.

Experiential learning is especially valuable in acquiring leadership skills. Expertise in attributes like conflict management and delegation is difficult to acquire by reading books or sitting in a classroom. The best way to grow your skills in handling conflict is to practice resolving contentious situations at work or even in nonwork situations. Note what you are doing that helps resolve the conflict and what you do that increases the level of disagreement. Over time, you will build your experience and confidence in handling contentious situations because you will have grown a database of techniques that work.

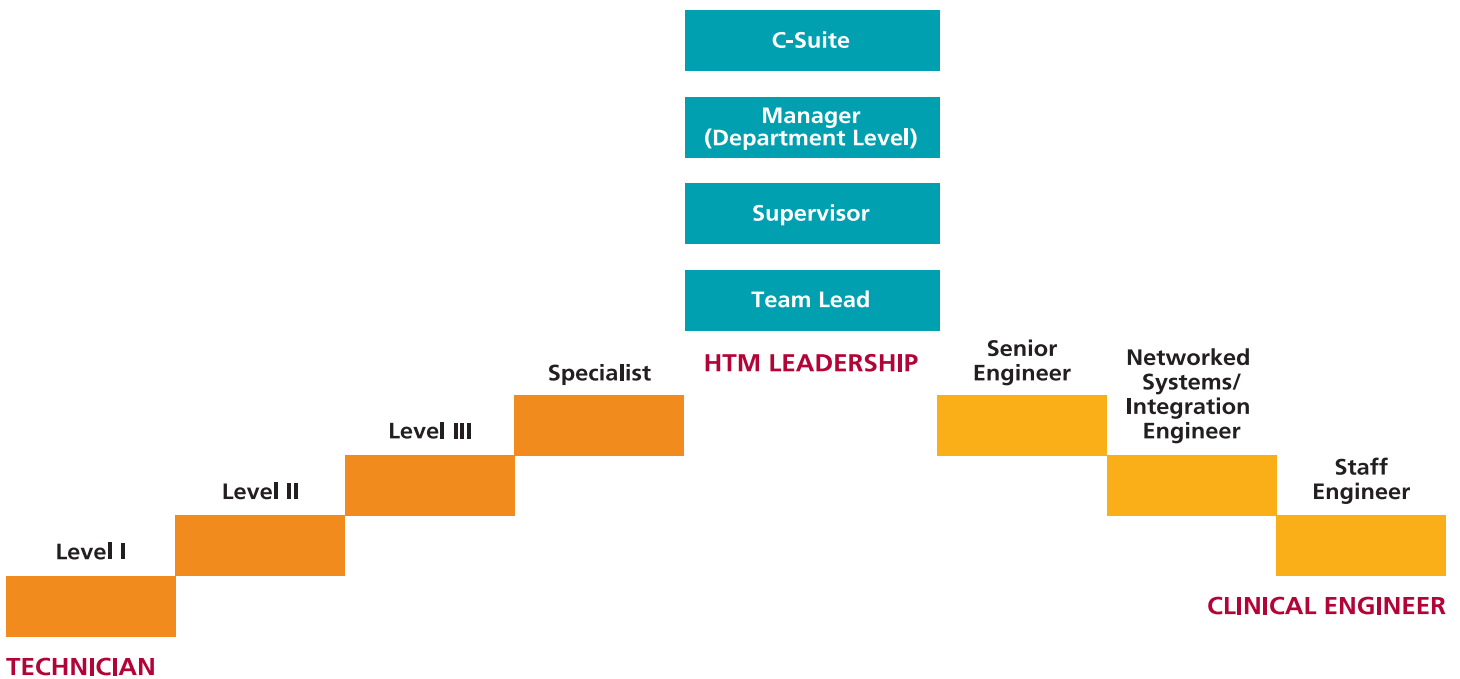
The next section of this guide details suggested developmental activities that can be used to grow your leadership knowledge and skills in competency areas as defined in the HTM leadership progression grid.

Outcome of Step 6:

Successful completion of developmental activities and progress toward your career goals.

HTM Career Progressions

The graphic below depicts the three potential career progressions in the healthcare technology profession: technical specialist, clinical engineer, and leadership. In this guide, we will describe the leadership progression. The technical specialist and clinical engineer career progressions are covered separately in *AAMI's Career Planning Handbook*.



HTM Leadership Progression Grid

The following pages contain the HTM leadership progression grid.

Navigating the Grid

The horizontal columns of the grid denote the different levels contained in the leadership job family. The vertical rows detail the competencies, experience, and skills needed at each level. When you read the column from top to bottom, you get a detailed description of the specific level. By reading a row from left to right, you can see the progression of skill or experience needed to progress through the levels from initial team lead to highly-experienced C-Suite leadership.

HTM Leadership Progression Grid

Skill/Experience	Team Lead	Supervisor	Manager (Department Level)	C-Suite
General Guidelines	Oversees work of small teams and other temporary work groups. Serves as matrix supervisor. Does not have permanent direct reports or HR, administration responsibilities. Reports to department-level manager or above.	Is responsible for daily management of direct reports. Schedules and assigns work to subordinates but continues to do highly-skilled repairs. Is responsible for HR and administration of direct reports.	Experienced HTM professional who is responsible for multiple teams and work groups. Has moderate budgetary and purchasing responsibilities. Reports to C-Suite leadership.	Highly-experienced healthcare administrator or chief executive who oversees HTM organization in large healthcare setting. Responsible for purchase and maintenance of high-tech equipment.
Education	Associate or bachelor's degree in a related discipline required.	Bachelor's degree in a related discipline required.	Bachelor's degree in a related discipline required. Master's degree desired.	Bachelor's degree in a related discipline required. Master's degree desired.
Leadership	Ability to learn from others on job desired. May be able to teach some basic skills to new hires or interns.	Able to learn from others on job. Can teach basic skills to entry-level staff. Optionally, can mentor others in basic skills.	Adept at learning on job as well as teaching and mentoring others. Optionally, has developed mastery to the level capable of mentoring other mentors. Experienced at leading and directing work of others.	Adept at learning on job as well as teaching and mentoring others. Considered technical expert in area of specialty and can mentor other mentors. Has executive-level leadership abilities.
General Skills and Experience	Has basic understanding and skills related to general electromechanical systems and devices.	Has basic understanding and skills related to general electromechanical systems and devices.	Has comprehensive understanding and skills related to general electromechanical systems and devices.	Has advanced understanding and skills related to general electromechanical systems and devices.
Communication Perspective	Able to communicate effectively one-on-one and in small groups.	<ul style="list-style-type: none"> • Able to communicate effectively individually and across departments. • Has sound written communication abilities. • Can present ideas persuasively to small groups and departments. 	<ul style="list-style-type: none"> • Able to communicate effectively individually and across departments. • Has sound written communication abilities. • Can present ideas persuasively to small groups and departments. • Has strong presentation skills. 	<ul style="list-style-type: none"> • Able to communicate effectively across organization. • Has sound written communication abilities. • Can present ideas persuasively to internal and external groups. • Has excellent presentation skills. • Can serve as powerful advocate for HTM profession.
Customer Service	Can solve basic frontline customer service issues.	Can solve service-line customer service issues.	Can solve service-line customer service issues.	Can successfully support solution of organization-level customer service issues and complaints.

Skill/Experience	Team Lead	Supervisor	Manager (Department Level)	C-Suite
Business Acumen	None required.	Understands fundamentals of business management.	Has advanced understanding of business management.	Has expert-level understanding of business management. Is adept at setting strategic direction and leading others to achieve business results. Is knowledgeable about key stakeholders and managing their expectations.
Financial Management	Understands basic budgeting concepts.	Understands how to manage small work group budgets and make modest budget forecasts and projections.	Has thorough understanding of budgets and forecasting. Prepares and presents financial reports as needed by organizational leaders.	Has advanced understanding of financial management, data analysis, and reporting. Has in-depth understanding of financial forecasting, return on investment, and other financial tools needed to run large healthcare organization.
Public Safety and Regulatory Requirements	Has basic understanding of both local and national public safety and regulatory issues.	Has working knowledge of both local and national public safety and regulatory issues.	Is an expert on both local and national public safety and regulatory issues.	Has working knowledge of both local and national public safety and regulatory issues. Can build network of advisors and supporters in safety and regulatory community.
Specific Equipment Expertise	None required.	<ul style="list-style-type: none"> • Has awareness of clinical equipment such as radiological, laboratory, and networked medical systems. • Has awareness of basics of project management. 	<ul style="list-style-type: none"> • Has working knowledge of clinical equipment such as radiological, laboratory, and networked medical systems. • Has proficiency in project management. 	<ul style="list-style-type: none"> • Has working knowledge of clinical equipment such as radiological, laboratory, and networked medical systems. • Has proficiency in project management.

Planning Worksheets

Skills Inventory Worksheet

Using past performance reviews, project post-mortems, assessment data, certification records, and any other sources of information you have, complete the self-assessment by rating your perceived level of expertise in each of the areas. You can also have your inventory reviewed and rated by a trusted colleague, mentor, or even your current leadership to reduce the bias you may have in your self-rating.

RATING SCALE

- 1 = No skill
- 2 = Basic
- 3 = Adequate
- 4 = Proficient
- 5 = Expert

Skill/Experience	Rating
Leadership 1. Learning new skills on job 2. Teaching and mentoring others	1. 2.
General Skills and Experience 1. Supporting general electromechanical systems and devices 2. Supporting specialty systems and devices	1. 2.
Communication Perspective 1. Communicating effectively at leadership level 2. Communicating in writing 3. Presenting information persuasively 4. Serving as advocate for HTM profession	1. 2. 3. 4.
Customer Service 1. Following customer service policies and procedures 2. Understanding importance of patient experience/HCAHPS 3. Solving problems 4. Analyzing issues	1. 2. 3. 4.
Business Acumen 1. Knowledge of business management 2. Setting strategic direction 3. Understanding key stakeholders/managing expectations	1. 2. 3.
Financial Management 1. Knowledge of financial management 2. Understanding budgeting, forecasting, financial tools	1. 2.
Public Safety and Regulatory Requirements 1. Knowledge of local and national public safety and regulatory issues 2. Knowledge of accrediting entities 3. Knowledge of regulatory entities 4. Knowledge of standards entities	1. 2. 3. 4.
Specific Equipment Expertise 1. Supporting radiology, laboratory, and networked medical systems 2. Understanding project management terminology and methodology	1. 2.
Other Skills or Experience	

Gap Analysis

Transfer the ratings from the Skills Inventory Worksheet in this document to the self-assessment rating column below. Determine the skill level needed for your desired future position by reading the position description or by talking with the manager who currently manages the position. The difference between the level needed and your self-assessment rating is the gap that you will need to fill with training and development.

Skill/Experience	Self-Assessment Rating	Level Needed	Gap
Leadership			
1. Learning new skills on job	1.	1.	1.
2. Teaching and mentoring others	2.	2.	2.
General Skills and Experience			
1. Supporting general electromechanical systems and devices	1.	1.	1.
2. Supporting specialty systems and devices	2.	2.	2.
Communication Perspective			
1. Communicating effectively at leadership level	1.	1.	1.
2. Communicating in writing	2.	2.	2.
3. Presenting information persuasively	3.	3.	3.
4. Serving as advocate for HTM profession	4.	4.	4.
Customer Service			
1. Following customer service policies and procedures	1.	1.	1.
2. Understanding importance of patient experience/HCAHPS	2.	2.	2.
3. Solving problems	3.	3.	3.
4. Analyzing issues	4.	4.	4.
Business Acumen			
1. Knowledge of business management	1.	1.	1.
2. Setting strategic direction	2.	2.	2.
3. Understanding key stakeholders/managing expectations	3.	3.	3.
Financial Management			
1. Knowledge of financial management	1.	1.	1.
2. Understanding budgeting, forecasting, financial tools	2.	2.	2.
Public Safety and Regulatory Requirements			
1. Knowledge of local and national public safety and regulatory issues	1.	1.	1.
2. Knowledge of accrediting entities	2.	2.	2.
3. Knowledge of regulatory entities	3.	3.	3.
4. Knowledge of standards entities	4.	4.	4.
Specific Equipment Expertise			
1. Supporting radiology, laboratory, and networked medical systems	1.	1.	1.
2. Understanding project management terminology and methodology	2.	2.	2.
Other Skills or Experience			

Personal Development Plan

Your Personal Development Plan will guide you in attaining the skills and experience needed to grow your career. Use the form below to identify your desired goals, specific actions needed to achieve those goals, time and costs (if any) associated with those actions, and the desired result of successful completion of the specific actions you've listed. Share your Personal Development Plan with your supervisor, mentor, and/or HR department. They can then provide the coaching, guidance, and support necessary to help you achieve your goals.

Specific Action	Estimated Time	Estimated Cost	Result
Developmental Goal			
Developmental Goal			
Developmental Goal			

Career Planning Opportunities

This section details the activities, actions, and opportunities available to grow knowledge and experience in the HTM profession for the leadership progression.

Education

Definition

Formal education for those in the HTM profession has various options depending upon the career goals of the individual. The following list describes the different academic degrees and programs available for the HTM professional who desires to move into a leadership position or advance in leadership levels in their organization.

- Bachelor's degrees—Four-year degrees that support engineering disciplines such as clinical engineering, biomedical engineering science, and biomedical engineering technology. HTM professionals who desire to advance into organizational leadership positions may also obtain a four-year degree in business management, engineering management, or organizational leadership.
- Master's degrees—Graduate-level degrees that focus on business management, such as a Master of Business Administration, Master of Healthcare Administration, or master's in biology or healthcare technology.
- Doctoral degrees—Advanced graduate study for those aspiring to obtain research positions or to teach at the university level.
- Managerial certificates—Non-degree business certificate programs are offered by many higher education business schools. Executive business certification programs are designed to be taken by working students and include night, weekend, and virtual classes.

Note—You can view a complete listing of academic institutions that grant HTM degrees on the AAMI website (www.aami.org) under Career Tools.

Developmental Activities

- Using the HTM leadership progression grid as a guide, determine long-term career goals. Identify the future formal education you need to attain your long-term goal.
- Talk with your supervisor or Human Resources representative to see if your organization offers tuition reimbursement for additional education.
- Research available colleges and universities under the Career section of the AAMI website.
- Research online or distance education options as well as executive degree programs that allow for evening and weekend attendance.

Leadership

Definition

The ability to inspire individual and organizational excellence, create shared vision, and successfully manage change to achieve organizational strategic goals. An HTM leader delegates and assigns work to others, monitors progress, takes corrective action as needed, and provides feedback, coaching, and mentoring to staff.

Developmental Activities

- Identify a mentor in your organization who can provide help and guidance on building your leadership skills and experience. Set learning goals with your mentor and meet regularly with him/her to assess your progress on achieving your learning goals.
- Identify an external mentor who can provide guidance on your leadership actions in your specific workplace. Use this external mentor to help you identify areas for improvement and learning opportunities to grow your skills and experience.
- Partner with peers who work in other departments within your organization to gain a foundational understanding of the business side of running a healthcare organization, including such areas as facilities management, supply chain management, etc.
- Seek out opportunities to lead teams and supervise others in order to acquire increasing levels of responsibility.
- Seek out opportunities to lead a cross-functional organization committee. Become recognized as an asset to committees seeking to get results and make a difference.
- Read books or attend workshops about the different leadership styles to develop an understanding of your own style of leadership and your strengths and areas needing improvement as you grow your leadership abilities.
- Complete assessments that give you feedback on your leadership skills and abilities from those who work with you. Use this feedback to identify learning areas to add to your Personal Development Plan.
- Look for opportunities to mentor others. Engage as a formal mentor with at least one staff person new to your organization. Ask your mentee for feedback on how well you are providing guidance and helping them. Use this feedback to adapt and adjust your mentoring to be more effective.
- Volunteer to serve as team lead or chairperson on an organization-wide committee or task force.
- Volunteer to serve in a leadership role in a local, state, or national professional organization or society.

General Skills and Experience

Definition

The ability to comprehend and communicate the fundamentals of health support systems and devices in order to make effective decisions on their purchase and use. An HTM leader understands the connectedness of systems and devices, understands equipment life cycle management, and can explore emerging technologies and their applicability to various environments.

Developmental Activities

- Work with a senior HTM staff member or subject matter expert on a monthly basis to keep your knowledge current on the basic devices used at your organization for non-acute patient care.
- Continue to expand your knowledge and experience of the overall biomedical device inventory at your healthcare institution through on-the-job training and observation, and by reading manuals and equipment literature.
- Read professional journals, attend AAMI and other field-related professional organization or society conferences and webinars, and participate in professional online communities and chat rooms to maintain current levels of understanding on new equipment and technology.
- Attend clinically-related conferences and symposia.
- For BMETs, obtain International Certification Commission (ICC) certification: biomedical equipment technician (CBET), radiology equipment specialist (CRES), and laboratory equipment specialist (CLES).
- For clinical engineers, obtain American College of Clinical Engineering (ACCE) clinical engineering certification.
- Be an active member in your local biomed association or society.
- Attend AAMI and other field-related professional organization or society conferences.

Communication Perspective

Definition

The ability to effectively communicate vision and strategy as well as operational and tactical plans. An HTM leader is adept at communicating complex technical issues to nontechnical professionals and patients.

The ability to develop, disseminate, and implement policies. An HTM leader effectively communicates by building rapport with diverse audiences, persuading others to adopt new points of view or new perspectives on issues, motivating and engaging staff, maintaining formal and informal channels of communication, being adept and versatile with written communication, and demonstrating excellent presentation skills].

Developmental Activities

- Seek a mentor from your organization's Communications department. Learn the key messages and methods used by your company for communication.
- Observe how your senior leaders communicate in writing and orally. Note their skills and techniques, especially when communicating difficult messages or challenging information.
- Identify role models who display excellent communication skills to emulate. Note what they do to be effective. Talk with them about how they became such good communicators.
- Obtain feedback from mentors and peers on your presentation style after leading a meeting, giving a speech, or presenting information. Note what is effective and what you need to improve.
- Join Toastmasters International or another group to improve your speaking skills.
- Develop and use active listening skills such as restating, summarizing, and using probing questions.
- Understand the concept of focused messaging and learn how to adapt your delivery to the message and audience.
- Write a regular column on HTM issues and accomplishments for your organization's newsletter or other publication.
- Submit an article for publication in a professional journal.
- Present a speech at a large employee meeting such as an all hands meeting.
- Present a paper you have written on current HTM issues at a professional association meeting.
- Present a speech at a healthcare conference or meeting at the state or national level.

Customer Service

Definition

The ability to provide optimal customer service to both clinical staff and patients. An HTM leader is dedicated to meeting the expectations and requirements of internal and external customers, can rapidly solve customer service issues from individual cases to organization-wide problems, is focused to constantly observe and enhance the patient experience, and serves as a model of optimal customer service.

Developmental Activities

- Gather and evaluate customer feedback to make improvements in service.
- Build and maintain effective relationships with customers to gain trust and respect.
- Become versed at reading customer service feedback and data reports for your organization.
- Read about other organizations' customer service models, particularly those known for their service culture, such as Ritz-Carlton. See how these models can be translated to work in your organization.
- Monitor online customer service feedback sources such as Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS) and the Leapfrog Hospital Survey results. Communicate customer feedback issues and concerns to the appropriate organizational staff for resolution.
- Understand the factors that drive reimbursement for your services and ensure that these factors enhance the customer experience.

Business Acumen

Definition

The ability to understand the basic fundamentals of running a successful business. An HTM leader possesses financial literacy and knows how financial impact affects strategy, decisions, and actions. The leader is knowledgeable about the organization's competitors; well versed in current and future policies, practices, trends, and developments that affect the running of the organization; and able to mine data from sources of information and benchmark departmental performance.

Developmental Activities

- Review your organization's annual report, long-term strategies, and operational plans, and seek guidance on any questions you have in understanding them.
- Partner with peers who work in other departments within your organization to gain a foundational understanding of the business side of running a healthcare organization, including such areas as facilities management, supply chain management, etc.
- Seek opportunities to serve on groups in your organization that are responsible for strategic planning.
- Seek opportunities to perform temporary job rotations or assignments in other business operation departments in your organization.
- Work with a mentor within or outside of your organization who is at the level of leadership to which you aspire. Ask them to guide your business acumen skills and experience.
- Serve on a professional association's task force or committee that is responsible for leading the association to learn about leadership decisions and how they affect business operations.
- Seek volunteer activities such as serving on a leadership committee for a nonprofit organization to broaden your understanding of business fundamentals.
- Read, on a regular basis, a broad range of business publications such as *Forbes* magazine, *Barron's*, *Business Week*, and *The Wall Street Journal*.
- Read publications about business issues in the healthcare industry from such sources as American College of Healthcare Executives (ACHE) and Health Administration Press.

Financial Management

Definition

The ability to understand the fundamentals of financial management in healthcare. An HTM leader is knowledgeable about the drivers of costs and revenue generation, can successfully manage a budget while keeping variances to a minimum, understands financial modeling and forecasting, and knows how to evaluate financial performance and set targets and goals.

Developmental Activities

- Take a class in finance for nonfinancial managers.
- Gradually increase your budgetary authority and expenditure signature level.
- Meet regularly with a peer in your organization's Finance and Administration department to gain an understanding of how your organization manages finances and financial reporting.
- Participate in the financial planning and forecasting process in your organization. Track actuals to forecast and explain any variances to use in future forecasting exercises.
- Successfully manage your department's budget to within an acceptable variance percentage.
- Using peer mentors, learn about your organization's process and procedures for contract and procurement management.
- Understand cost reimbursement based on the equipment used and how reimbursement rates can vary by equipment type.

Public Safety and Regulatory Requirements

Definition

The ability to understand, explain, and comply with safety regulations, standards, and codes applicable to the clinical environment. The Joint Commission, National Fire Protection Agency (NFPA), AAMI, and the Centers for Medicare and Medicaid Services (CMS) are just a few of the organizations and agencies that set safety standards, codes, and/or regulations with which you should become familiar.

Developmental Activities

- Keep up to date on the most current safety and regulatory information governing your organization. Determine the processes and procedures your staff needs to follow to be compliant.
- Maintain current knowledge of the overall safety and regulatory requirements of the healthcare industry.
- Continually monitor all updates and changes to regulations and incorporate these changes into your organization's policies and procedures.
- Read publications from The Joint Commission such as *Environment of Care* and other updates from accrediting organizations.
- Take classes and webinars in risk management and risk mitigation.
- Serve on your organization's Business Continuity or Disaster Recovery task force or committee.
- Serve on a task force or committee that oversees safety and regulatory issues for your organization.
- Take classes and workshops on safety in healthcare.
- Research the impact of accrediting organizations (AOs) on your organization's policies and procedures.
- Learn about how the Hospital Care Assurance Program (HCAP) affects your organization.
- Present at AAMI and other field-related professional organization or society conferences on the topics of safety and regulatory regulations.
- Identify opportunities to influence changes in standards and regulations by serving on a standards committee for your organization.
- Volunteer to help create standards for AAMI standards and regulatory committees and task forces.

LOWER LEAD

Specific Equipment Expertise

Definition

The ability to understand specific, advanced, and costly equipment and devices of high acuity and with direct patient contact, and how to most effectively allocate the equipment. The ability to understand and communicate the impact of specialized equipment on the organization's strategic plan and financial goals.

Developmental Activities

- Attend vendor schools or manufacturer training courses to gain expertise on advanced equipment.
- Stay current on all relevant trade magazines and technical journals.
- Lead your organization's task force or committee chartered to purchase new equipment.
- Understand the resources needed to maximize the use of specialty equipment, and ensure that those resources are adequate and available.
- Be adept at communicating how your specialty affects patient flow, clinical workflow, and other aspects of healthcare administration and outcomes in your organization.

Communicating Your Plan

Guide for Meeting with Your Organizational Leadership

Use the following checklist to organize the meetings you will have with your organizational leadership to discuss your career goals and Personal Development Plan. You will want to meet with your leadership on a regular basis to review the progress made toward your goals and get input and advice on future steps and actions.

Step 1: Plan the meeting

- Choose a place where the meeting may be held to remove all distractions and interruptions.
- Review and have ready any questions you may have about developmental opportunities.
- Review and have ready any questions you may have about resources you may need, including budget dollars and release time.
- Prioritize the issues.

Step 2: Conduct the meeting

- Review the goal for the meeting.
- Review the development you have accomplished to date.
- Review the development results and whether they were as you anticipated.
- Preview the development actions for the next period of time.
- Make the conversation a dialogue—open and two-way.
- Use active listening skills and look for any emotional cues that you need to explore.
- Discuss your leadership's concerns or issues about the progress of your development.
- Discuss your concerns or issues about the progress of your development.
- Remember to summarize information before moving on.
- Agree on the proposed next actions.

Step 3: Follow up after the meeting

- Obtain any approvals needed for formal education.
- If needed, schedule time off and backup.
- Send an e-mail summarizing the next steps and the revised Personal Development Plan.
- Set a date for your next progress review.

Guide for Meeting with HR

If your career goal is to advance through the levels of the leadership progression or advance into higher levels of management, you may want to meet with your Human Resources staff to verify that there is organizational opportunity to support your goal. As with the meeting with your organizational leadership, prepare for the meeting with HR by using the checklist below.

Step 1: Plan the meeting

- Determine the goal for the meeting.
- Choose a place where the meeting may be held to remove all distractions and interruptions.
- Review and have ready any questions you may have about your career goal.
- Review and have ready any questions you may have about support resources, including budget dollars.
- Prioritize the issues.

Step 2: Conduct the meeting

- Review the goal for the meeting.
- Review your career goal and Personal Development Plan.
- Preview the development actions for the next period of time.
- Explore opportunities for advancement organization-wide that are outside of your immediate department.
- Ask if HR can recommend mentors from other parts of the organization.
- Make the conversation a dialogue—open and two-way.
- Use active listening skills and look for any emotional cues that you need to explore.
- Discuss HR's concerns or issues about your goal and/or plans.
- Remember to summarize information before moving on.
- Agree on the proposed next actions.

Step 3: Follow up after the meeting

- Send an e-mail summarizing the next steps.
- Set a date for your next meeting, if needed.

Interviewing for Leadership Positions

Dos and Don'ts of Senior Level Interviewing

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The higher you advance in an organization, the more prepared you must be to interview for your next position. For a leadership position, you should be able to convey not only your technical expertise, but also your managerial and leadership abilities. Use the following tips to prepare for leadership position interviews.

Before the Interview: Prepare

Never go into an interview without doing your homework. You need to know as much as you can about the position, the hiring manager, the group you will be leading, and the hiring organization. Company websites can provide you with a wealth of information. Professional network connections may be useful for inside information about the company culture. Use this information to make sure that the position is a fit for your work style and expectations.

Things you should find out before the interview include:

- What is the position title, reporting structure and skills, and technologies and methodologies needed for success? Hopefully, you can get most of this information from the position posting, job advertisement, or position description. If you are applying for an internal position, try to obtain a copy of the position's annual goals and objectives. Aim to ascertain how closely this position matches what you bring to the interview, and to be fully prepared to answer questions about any gaps in your skills and experience.
- What are the interpersonal or managerial dimensions of the position? What can you learn about the people you'll be working with? This information is easier to obtain if you are applying within your current organization. If outside your current organization, try to get any information you can from your network. Use LinkedIn to view work histories and biographies.
- What are the organization's mission, vision, and long-term strategies? How is it placed in the market? Who are its competitors? Look for this information on the organization's website, in its annual report, and from sources of industry news. Look for indications of how the position supports the organization's long-term strategies and goals.

During the Interview

Whenever possible, try to answer questions with stories that illustrate your proficiency in the skill or experience needed. Stories are more engaging and memorable than a curt list of achievements and dates. Good interview stories are brief and succinct, and contain the following critical components:

- **The Situation**—What was the problem, project, or task that you are describing?
- **The Action**—What did you do specifically that addressed the problem, project, or issue?
- **The Result**—What were the tangible results or outcomes of your work?

These three components tell the whole story and illustrate the role you played in the success. Make sure to use a mix of “I” and “we.” Too much “I” can make you sound arrogant, whereas too much “we” sounds like everyone else did the work while you watched.

After the Interview

As soon as the interview is over, find a quiet spot and make notes on your impressions. What do you think went well? What do you think you could have done better? Did you discover strengths that helped? Did you realize that you have gaps in skills or experience? Record everything that will help you prepare for subsequent interviews.

Send a letter or e-mail thanking everyone who participated in the interview. Offer to provide any additional information that they will need to help make their decision. Follow up periodically, asking for the status of their decision and again offering to send additional information if needed.

If you do not get the job, do one more set of follow-ups asking for feedback. Try to get specific information about what skills or experience you need to gain for future openings.

Appendix—FAQs

Why did AAMI create *AAMI's Leadership Development Guide*? Who should be using it?

AAMI created *AAMI's Leadership Development Guide* to help HTM professionals advance their career into supervisory or leadership positions. Some HTM professionals work in large organizations that provide them with career guidance. Others work in smaller healthcare settings which lack the resources to provide help with career planning. AAMI's goal in creating this guide is to help individuals develop their careers and to advance the HTM profession by assisting more of its members achieve positions of authority in their organizations.

My organization does not have supervisory positions in the HTM unit. What can I do to advance my career into leadership?

Start by talking over your career goals with your supervisor. Don't have as your goal to simply get promoted. Describe how you plan to grow your skills and experience to be of more value to your organization. List the supervisory skills and experience that you would like to develop.

Next, take your career plans to Human Resources to investigate whether there are supervisory positions outside of your department that you might consider. Perhaps a lateral move to another unit may provide you with more advancement opportunity.

Share the HTM career progressions graphic and HTM leadership progression grid in this document with your supervisor and Human Resources so that they can see the leadership progression proposed by AAMI for HTM professionals.

Can you provide salary ranges for the different levels?

Salary ranges for positions vary across the country based on the size of the organization, its salary budget, and the availability of professionals in the job market. It would not be possible for AAMI to research and publish salary information that would be accurate for all locations that hire HTM professionals. Check with your HR department to determine the salary ranges for your position and other positions in your organization.

I live in an area that does not have colleges or universities with the kinds of advanced degrees that I am seeking. Are there other ways I can advance my professional learning?

There are various e-learning programs that can be accessed anywhere. Webinars also offer a way to learn remotely. For example, the Colorado Association of Biomedical Equipment Technicians (CABMET) offers a CBET review course that is available to anyone across the country. The AAMI website lists a number of virtual learning programs in its Career Tools section.

Massive open online courses (MOOCs) may also be used for professional development. MOOCs are college-level courses that are offered free of charge by some academic institutions. Coursera (www.coursera.org) and edX (www.edx.org) are the two largest providers of MOOCs.

When I finished my BS degree last year, I thought I was done with taking classes and seminars. This guide makes it sound like I need to take training classes throughout my entire career.

To be a successful HTM professional, you need to keep up to date on the technical and regulatory changes that occur in the field. Technology and medical devices are constantly moving forward, and continued professional development is the only way to stay current on the new developments in healthcare and technology. In the Career Planning Opportunities section of this guide, we've outlined numerous ways to learn and develop. The AAMI website also lists learning resources and ways to keep current. The annual AAMI conference as well as local and state conferences are additional venues for learning and keeping up your skills.



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