

Effective Case Managers

1. Establish a vision

Case managers create expectation for significant and lasting achievement. They give meaning to outcomes by associating even menial tasks with valued personal and professional goals.

2. Stimulate people to gain new competencies

Case managers stimulate others to stretch their minds and their desire to learn. They freely share their own expertise and put people in touch with new resources.

3. Help others to overcome obstacles

Case managers help others to overcome obstacles. They help others find the courage and strength to persevere in the face of difficulties.

4. Help others to overcome failure

Case managers help people cope with failure and disappointment. They are quick to offer others new opportunities for success when they fail.

5. Lead by example

Case managers are models of integrity and hard work. They set the highest expectations for themselves and, therefore, others.

6. Celebrate success

Case managers are quick to identify positive outcomes and focus on success.

Your Role as Cop

Clearly defining and ensuring adherence to the non-negotiables.

- ◆ State the rules - identifying the do's and don'ts
- ◆ Set clear expectations for success
- ◆ Provide structure and support

Four Tips for Making the Cop Role Work for You

1. Be clear and set the **parameters!**
2. Don't use **tentative language!**
3. Set **specific deadlines** – no ranges!
4. Discuss the **“how”** not the **“what”!**

Your Role as a Coach

Assisting others identify, learn, and refine skills.

9 Ways to Enhance your Coaching Role

1. Have the **customer translate issues into problem statements**.
2. Observe that the customer is able to **attend to several problems simultaneously** instead of one at a time.
3. Ask customers to develop **action plans for solving their work-related problems**.
4. Ask customers to **summarize** what was covered in a meeting.
5. Encourage customers to **express their feelings** about decisions that they make.
6. Point out **dysfunctional behaviors** that interfere with the customer's ability accomplish tasks.
7. Reinforce positive **team building behaviors**.
8. Respond to customers' questions with open-ended questions to teach **customers** how to problem solve for themselves.
9. Suggest **resources that customers may access** to acquire information they need.

Your Role as a Consultant

**Providing options, tools,
information, and
recommendations that the
customer can then integrate into
their everyday practices.**

Facilitate	Communicate	Influence
Have good organizational skills	Share information frequently	Build trust
Have good interpersonal skills	Provide information in multiple ways	Have strong networks
Be capable and neutral	Listen and ask a lot of questions	Foster long-term relationships
Be supportive and flexible	Demonstrate and confirm understanding	History of success
Be good negotiator	Check in frequently	Share ideas and opinion
Provide examples and suggestions	Provide feedback	Provide options
Provide tools	Stay focused on the issue at hand	Convince others to see from your point of view