

**A Handbook for Those Who Wish
to be Advised**

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What is an advisor?

Advising is perhaps the truest form of dynamic learning. It is two people with a commitment to assist each other, for example, in furthering their professional careers. Most successful people have had an advisor at some point in their career. The title wasn't always "Advisor"; sometimes it was teacher, friend, religious leader, or even parent or relative. Whatever the title, the role of this person was likely to have been very similar. Now that you are seeking to be advised, you are making what could be a pivotal decision in your career.

It is important, as you establish your relationship with your Advisor, that you understand what expectations are reasonable and what expectations would be nice if they were fulfilled. An Adviser is NOT a person who is going to get you a job, give you all the answers you need to succeed, or serve as a counselor to deal with areas of your personal life outside of your career.

An Advisor is someone who:

- Is or has been where you want to go. They are willing to assist you in meeting the challenges of reaching your next goal.
- Helps you define strategies for career advancement, recommends activities to achieve goals, and helps identify and overcome obstacles to achieving goals.
- Coaches you by role modeling skills, helps you to learn and develop skills, reinforces effective behaviors, and provides support and guidance to achieve agreed upon goals.
- Is willing to share their assessments, viewpoints, and life experiences to help you make plans and succeed in your career.
- Serves as a resource by sharing their professional network with you and identifies professional development opportunities for you.
- You can "bounce ideas" off of, before taking the risk of going public with them in a potentially more risk adverse environment.
- Is capable of and willing to learn from you.
- Shares ideas and experiences so that both of you leave the relationship enriched.
- Is an advocate for you.

What are the expectations of an Advisor/Advised relationship?

A person who is being advised is expected to be proactive in the relationship, actively seek an Advisor, and have an understanding of what is expected as well as what they expect to bring to the relationship. While the Advisor offers his/her knowledge and experience, you have the responsibility for taking full advantage of what you have learned, internalizing it, and ultimately passing it on. One way to share your learnings from a successful Advising relationship is to act as an Advisor to others.

Keep in mind that an Advisor/Advised relationship is not necessarily a life-long relationship. Because by its definition an Advising relationship is one that fosters growth in both parties, it is also a relationship that is destined to end, at least in the Advisor/Advised format. As you and your Advisor progress in your career, the Advisor/Advised relationship may eventually end. It is also possible that the different type of relationship may endure and at a different level, perhaps a friendship.

What are the benefits of being advised?

Identifying what you want from the Advising relationship is a first step in achieving your goals. The following list contains possible reasons for wanting to be advised. As you read it, think about why *you* want to be advised. This will help you determine what you seek in an Advisor and assist you in planning that very important first conversation during which you define the Advisor/Advised relationship.

- Increase your understanding of how to best utilize your abilities and skills.
- Have someone help you identify career goals and plan a path to achieve those goals.
- Avoid some career pitfalls by learning from someone with more experience.
- Create a “think tank” as a safe environment for clarifying your thoughts and being able to think in new ways.
- Learn more about the culture of your current organization or the one you want to join.
- Become excited and energized about your job again; open yourself to possibilities of personal growth.
- Become more involved in what is going on around you, whether it is at work or in your chapter. Expand your professional network.
- Continue a pattern of personal growth by accepting new challenges and in a new direction.
- Develop a sharing relationship with a colleague. This is especially important when you are the only person with your particular career path in your organization.
- Have a professional relationship with a person of your own choosing, not someone on your team or in your department that you have been assigned to work with.

Perhaps the first question you need to answer before you seek an Advisor is *Quo vadis?*
Where are you going?

How can you get the most out of being advised?

- **Be open.** Be willing to share your needs, concerns, goals, and what you seek from being advised with your Advisor.
- **Be able to state your goals/desires clearly.** This may require going back to the earlier question of Where are you going? Use that as the basis for formalizing your ideas. If necessary, write out your goals for the Advising activity. The more clearly you write the goals, the more likely you will be able to communicate them clearly to your Adviser.
- **Be open to change.** One of the purposes of being advised is to bring about changes that you can't see, or influence by yourself. Advising may be helpful if you are looking for someone to validate your current activities. Advising can be more beneficial if you are willing to change.
- **Be prepared to trust your Advisor.** If you are paired with an Advisor that you just don't feel you can trust, for whatever reason, you may want to seek a different Adviser. If you are personally selecting your Advisor, an important consideration for the relationship is choosing someone you can trust. A highly skilled and competent person may not be the best Advisor if you do not feel you can trust that person.
- **Be prepared to contribute.** Advising is a two-way street. While your Advisor may have contacts and experiences that are valuable to you, you also have skills and knowledge that may be valuable to your Advisor. The best relationship is the one where both people believe that they are benefiting from the relationship. As you learn and continue to develop your skills, be willing share your discoveries with your Advisor.
- **Be realistic in your short-term goals.** You may work with your Advisor for only a designated time period. Look critically at the goals you have set for yourself and the reasonableness of the intermediate steps. If you are a financial analyst, the best Advisor for you may not necessarily be the CFO. Someone with experience in an intermediate position may be able to provide you more of the "hands-on" tips you need to succeed immediately and introduce you to people at higher levels when you are ready for that.
- **Consider your HFMA chapter as a place to practice the skills that will make you successful at work.** For example, giving a presentation at a chapter meeting can develop public speaking skills. It may not be necessary for you to develop skills at the level required to speak to a Board of Director. Strategic planning is a necessary skill for those who aspire to a higher position. Chapters have an annual strategic planning activity that you can volunteer to participate in. The chapter is one of the safest places to learn and practice new skills.
- **Offer to advise someone who is newer than you are.** Everyone has something to teach, something to share. Invest early in others; it is a good habit to learn.

Okay, how do I get an Advisor?

The best approach is to ask someone, such as a person who:

- Works in your facility or a different facility
- Is more technically oriented than you
- Has responsibility for higher level administration or management

Once you have determined what you are looking for in an Advisor, create a reasonable plan. If you want someone in your facility, ask that person yourself or request someone who knows you both to intercede for you. If you are looking for someone outside of your facility, consider seeking a member of your chapter. Persons who may be able to serve as your Advisor, recommend others you can talk to, or introduce you to potential Advisors include the following:

- Your chapter president or retired president chapter
- The chapter job referral chair
- The chapter certification chair

These are people who are likely to have an extended network and as well as have an interest in helping members to succeed. Time spent networking with professionals in your chapter is a wise investment for your future. In addition to learning the technical skills that will allow you to succeed in your job, your work in the chapter allows you to develop the leadership and interpersonal skills that are also vital.

I have an Advisor, now what?

First, remember your Advisor may be as new in this role as you are. He or she may have valuable professional experience in the field and as a leader, and you should be prepared to capitalize on this experience. The relationship with your Advisor provides you with an opportunity to practice skills you will need and that will also bring structure to the relationship.

Advisers have many assets. They tend to like working with people, are open-minded, and have an array of interests. They have a genuine interest in helping others. They are the type of person that others would like to have dinner with or socialize with after a meeting. And eventually that is the sort of relationship you will want to establish. Right now, the best way to get where you want to be is to define your goals for the Advisor/Advised relationship and establish a plan of action for achieving them.

If your Advisor has already developed a plan or a contract, then you have something to build upon. If they haven't, then you will want to draft a plan to serve as a basis for the initial meeting. Remember, goals that never get set, never get reached. As you develop your "contract", consider the following questions:

- **What you want to take away from this relationship?** As a starting point, identify what you would like to accomplish. You may start with a short-term goal, e.g., converting to a new accounting system, and for that your Advisor might be a person who

has done that before and has strong in information technology skills. You may also set long-term goals, e.g., refining or developing skills needed to move to a leadership position in a healthcare organization, and you want the Advisor to teach you the necessary leadership and interpersonal skills. Your initial goals can change as you and your Advisor find out more about each other's strengths and opportunity areas.

- **How do you feel that this relationship will function best?** How often and for how long do you need to meet? Do you want to meet once a week? Would it be best if you just spent an hour together at quarterly chapter meetings, and then exchanged e-mails? Are you expecting a structured relationship that involves receiving and completing “assignments”, or perhaps exchanging ideas, obtaining feedback, and getting suggestions?
- **What sort of assistance do you expect from your Advisor?** Are you looking for “hands-on” assistance or seeking different ideas of how to approach a situation?
- **What are the ground rules for your meetings?** What is the expectation for confidentiality? Are there topics that you don't feel comfortable discussing because of possible competitive situations between employers or challenging situations that could arise? What level of commitment do you expect? Is it six months, a year, or longer?
- **Do you have commitment?** Now that the two of you have met and have talked about expectations, time commitment, and other issues you or your Advisor feels is important, it is time to ask the question: “Will you Advise me?” With expectations being known, it is time to decide if this will work for both parties.
- **Have you ever heard the old saying “oral promises aren't worth the paper they are written on”?** Take time to write a statement defining the relationship. Include goals, timeframes, desired end point, and how you will get there. An advantage of having an Advisor is that you have someone to help “keep you honest” and remind you of your commitments and your action plan. You also have responsibility to meet expectations of your Advisor.

Now that you are my advisor, who are you?

At some time in every contract, the other party to the contract becomes a real person. Some contracts can be met by keeping the relationship impersonal. That is not true of the Advising relationship. Once a decision has been made to initiate and develop an Advisor/Advised relationship, take time to understand each other and determine how you can best work together given your skills, abilities, experiences, working style, etc. Some things you may want to know about each other include the following:

- **How did you get into healthcare finance?** Was it a planned move, or a series of serendipitous occurrences? Did they come in through work in an accounting firm or work their way up through a hospital? Have they worked for different types of healthcare providers? What was it that brought them to where they are today?
- **Are there one or two things that were pivotal in their career?** Are there things that they think everyone should consider doing? Or things that they would tell people to avoid at all costs... and why?
- **What do they aspire to?** Are they where they always wanted to be? Do they envision moving up the career ladder? Do they see themselves taking a totally new tact, starting a business, something very different? How are these plans affecting them and the decisions they make? Is there something in the work environment that makes such decisions seem more right at this time? This question is an opportunity to encourage both of you to look to the future and share your insights with each another.
- **Based on their very brief time with you, what “first impressions” would the Advisor like to share with you?** Don’t ask it if you don’t feel comfortable getting the answer. It is said that you only have one chance to make a first impression. This is an opportunity for have to find out honestly about the first impression you make.

Okay, what next?

Work your way through your plan:

- Set your next meeting.
- Agree what you will each have accomplished by that next meeting.
- Establish next steps.

You may also want to build into your contract a time when you will both re-evaluate this relationship and see if it is getting you both where you want to be, and need to be.

**HFMA Mentoring Program
Person Being Advised Feedback Form**

In an effort to continuously improve our career development services, we request your feedback about your experience participating in an Advisor/Advised relationship. Attach additional pages as necessary.

Your name: _____ **Member Number** _____

Person who advised you: _____

Dates of the advising relationship: _____

1. The thing(s) I enjoyed most about this Advising experience was (were):

2. The part(s) of this Advising experience that I would do again in future Advising activities is (are):

3. The part(s) of this Advising experience that I wish had worked better is (are):

4. The most valuable thing(s) I learned from this Advising experience is (are):

5. Having been Advised, I would (would not) encourage others to participate in similar activities because:

***Return completed form to HFMA Career Services, Two Westbrook Corporate Center
Suite 700, Westchester, IL 60154 or fax to (708) 531-0032, Attn: Career Services***