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# Passing the Reins: Succession Planning for Physicians & Supply Chain Leaders

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CE Deadline: 09/30/25





# Moderator & Panelists



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# Disclosures



The presenters have no real or perceived conflicts of interest related to this presentation

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# Learning Objectives

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*At the end of this session, participants should be able to:*

- Recognize the risks and negative impacts of a lack of or ineffective succession planning.
- Identify the challenges faced between seasoned physicians and supply chain leaders and how to mitigate them.
- Recall key strategies for developing a successful succession program.



# SUCCESSION PLANNING



The Good, The Bad & The Ugly





# Succession Planning



## Definition:

*Succession planning ensures leadership continuity by proactively identifying & developing future leaders.*



# Franciscan Alliance



Respect for Life



Fidelity to our Mission



Compassionate Concern



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Christian Stewardship



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Carmel - Orthopedic Center of Excellence



Crawfordsville



Crown Point



Dyer



Indianapolis



Lafayette



Michigan City



Moorseville



Munster



Olympia Fields



Rensselaer



# Audience Poll Question #1



Does your facility currently have a process or procedure for succession planning?

- A. Yes, we have a fully implemented process
- B. We are in the process of creating
- C. No, we have not started this yet
- D. I am not sure



# Succession Planning



## Key Benefits

- **Operational Stability:** Avoid disruptions in patient care & supply chain operations.
- **Knowledge Retention:** Preserve critical expertise from experienced professionals.
- **Career Growth & Retention:** Encourage internal promotion & leadership development.
- **Strategic Alignment:** Ensure smooth transitions that align with the system's mission.



**“Succession planning is essential for organizations to thrive in an ever-changing environment.”**

*– Eric Schmidt, former CEO Google*

# Risks & Negative Impacts of Ineffective Succession Planning



**Disruptions in Continuity:** Leadership voids can create operational inefficiencies

- **Decision-making Delays:** Critical decisions may be stalled.
- **Lack of Direction:** Teams may struggle with uncertainty, leading to inefficiencies in workflow & administrative bottlenecks.
- **Operational Gaps:** Key responsibilities may be left unaddressed as interim leaders adjust, causing misalignment in strategic initiatives.



# Risks & Negative Impacts of Ineffective Succession Planning, *continued*



**Loss of Institutional Knowledge:** Departure of key personnel without knowledge transfer

- **Risk of Reinventing Processes:** Without documentation or mentorship, new leaders may have to rebuild strategies instead of refining existing best practices.
- **Limited Historical Context:** Understanding past challenges & successes helps shape future decision-making.
- **Reduced Efficiency in Training:** Transfer becomes sporadic, prolonging onboarding for new leaders.



# Risks & Negative Impacts of Ineffective Succession Planning, *continued*



**Decline in Morale & Retention:** Lack of clear career progression leads to disengagement

- **Uncertainty in Career Paths:** Employees may feel undervalued if leadership opportunities are unclear or inaccessible.
- **Increased Turnover Rates:** Talented professionals may leave for organizations with better-defined career growth structures.
- **Lower Engagement & Productivity:** Employees who see no future within the organization may disengage from their roles, impacting overall performance.



# Key Strategies for Creating a Strong Succession Plan



- **Identify Critical Roles & Future Needs:** Determine which leadership positions are vital to organizational success & assess future talent requirements based on evolving healthcare trends & supply chain innovations.
- **Engage Current Leaders in Knowledge Transfer:** Have outgoing leaders actively mentor & share institutional knowledge, best practices & decision-making insights with emerging leaders.
- **Create Clear Competency & Performance Metrics:** Establish measurable benchmarks for leadership readiness, ensuring candidates align with organizational culture, values & strategic goals.
- **Establish a Governance Structure for Succession:** Develop a formalized transition framework with timelines, roles & responsibilities to prevent operational disruptions.

# Key Strategies for Creating a Strong Succession Plan, *continued*



- **Develop a Talent Pipeline:** Establish mentoring programs, leadership training & professional development opportunities for potential successors. Encourage cross-training to enhance skills.
- **Evaluate Internal & External Candidates:** Assess both internal employees with growth potential & external industry leaders who may bring fresh perspectives.
- **Ensure Adaptability & Future-readiness:** Focus on leadership agility, technological competence & innovative thinking to prepare successors for future healthcare & supply chain challenges.
- **Communicate & Gain Stakeholder Buy-In:** Keep employees, teams & external stakeholders informed of succession plans to maintain trust, stability & engagement.



# Two Critical Factors



## Preparing for Leadership Transition

- Enhances Organizational Agility
- Maintains Continuity in Value Analysis
- Prevents Knowledge Gaps
- Reduces Operational Risks
- Strengthens Long-term Leadership Development

## Physician & Supply Chain Leader Relationship

- Influences Evidence-based Purchasing Decisions
- Improves Adoption of New Technologies
- Enhances Compliance & Regulatory Alignment
- Drives Cost Optimization & Standardization
- Speed to Execution

# Tips for Successfully Passing the Reins



- **Create a Transition Timeline:** Ensure leadership changes happen gradually, allowing successors to shadow & progressively take on responsibilities
- **Facilitate Leadership Coaching & Onboarding:** Provide structured training programs, executive coaching & exposure to strategic decision-making before the official transition
- **Implement Knowledge Management Systems:** Document policies, protocols, workflows & best practices to minimize disruptions & ensure a seamless leadership handover
- **Monitor & Evaluate the Transition Process:** Conduct post-transition assessments to measure leadership effectiveness & address any gaps in execution
- **Encourage Open Dialogue & Feedback:** Maintain transparency by fostering discussions between current & incoming leaders, ensuring alignment with expectations & organizational goals





# Navigating Physician & Supply Chain Leader Relationships



## Challenges

- **Differing Priorities:** Patient care vs. cost-effectiveness & operational efficiencies
- **Communication Barriers:** Lack of common language & shared decision-making framework
- **Resistance to New Strategies:** Hesitation in adopting modern procurement & operational models
- **Data vs. Experience Dilemma:** Supply chain leaders rely on data; physicians trust clinical expertise

## Mitigation Strategies

- **Collaborative Committees:** Creating physician & supply chain alignment groups
- **Transparent Communication:** Establishing joint decision-making frameworks
- **Educational Programs:** Training physicians on supply chain efficiencies & group purchasing organizations (GPOs)

## Audience Poll Question #2



What barriers do you have in starting a supply chain succession plan?

- A. Don't know how to start
- B. Takes too much time/energy
- C. The system/facility I work for already has one
- D. Don't have senior leader buy-in
- E. Not sure



## Audience Poll Question #3



What role do you see a GPO taking to help with succession planning?

- A. Basic education on what a GPO does
- B. Advanced education on a GPO
- C. Providing leadership/mentoring opportunities
- D. Not sure

# The Ideal State of a Successful Succession Program



- **Defined Career Progression:**  
Clear pathways for physician & supply chain leadership roles
- **Proactive Talent Development:**  
Identifying, mentoring & retaining future leaders
- **Integration of GPO Education:**  
Teaching stakeholders how GPOs optimize efficiency & align with facility goals
- **Strong Governance & Policies:**  
Ensuring structured transitions with minimal disruption
- **Ongoing Evaluation & Adaptation:**  
Keeping the succession strategy agile with evolving industry demands



# Key Strategies for Success



- **Internal Growth & Promotion Culture:**  
Encouraging leadership development within the organization
- **Cross-departmental Training:**  
Physicians & supply chain leaders understanding each other's workflows
- **Stakeholder Engagement:**  
Aligning leadership goals with the mission & vision of the facility
- **Performance Metrics & Accountability:**  
Measuring the effectiveness of succession plans over time







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*Thanks y'all!*

