

Leadership Skills for the Successful Case Manager

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October 11, 2025

2025 CMSA of the Chesapeake - Fall Mini Conference
National Case Management Week

1

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- System Vice President & Chief Nursing officer
Nursing Professional Development, workforce Management & Academic Affairs @ MedStar Health, Columbia, MD
- BSN, 1987 – American University of Beirut, Lebanon
- MS, 1992 – College of Mount Saint Vincent, Riverdale, NY
- PhD, 2003 – Columbia University, NYC, NY
- Inducted Fellow – American Academy of Nursing, 2016
- Inaugural Fellow – Case Management Society of America, 2021
- Lifetime Achievement Award, Case Management Society of America, 2016
- National Award of Service Excellence, Case Management Society of America, 2025
- Author of three case management textbooks and > 120 peer reviewed articles
- Loves to travel and outdoor activities (Ziplining, White Water Rafting, Sky Diving)



2

Time to Celebrate Our

**Contributions to Our Practice and
People's Health and Well-being**



GUIDING JOURNEYS
NATIONAL CASE MANAGEMENT WEEK

3

3

Learning Outcomes

- Describe what leadership means to the practicing professional case manager.
- Identify the essential leadership characteristics of the successful case manager.
- Examine one's own leadership compass for continued growth and development.

4

4

Case Management is in Constant Evolution

- Dynamic healthcare industry and practice environments
- Increased and volatile sociopolitical and economic pressures
- Impetus for transformation in care delivery and case management models
- Regulatory and legislative changes
- Social drivers of health
- Value-based reimbursement methods
- Economic/financial incentives and concerns
- Quality and safety; high reliability
- Innovation – artificial intelligence and digital technology
- The “patient experience of care” revolution

5

5

Key Observations

Maturation of
professional case
management
practice

- ✓ Practice is >5 days/week; 8 hours/day operations with on-call presence
- ✓ Quality, safety and outcomes
- ✓ Nationally recognized Standards of Practice and Code of Ethics
- ✓ Baccalaureate or higher academic education
- ✓ Value of specialty certification
- ✓ Diverse practice setting
- ✓ Virtual care models
- ✓ Clinical care vs utilization management

6

6

What does leadership mean to you?

7

Professional Case Manager as a Leader

- Organizational structure
- Environment of practice
- Multidimensional
- Individual
- Personal
- Prior experience
- Scope of role responsibilities
- Values
- Expectations
- Purpose
- Goals
-

8

Management Vs Leadership

Management	Leadership
Process-oriented	Change-oriented
Efficiency and short-term goals	Vision and long-term goals
Implements plans and ensures tasks are completed	Sets direction and environment for change /transformation
Focuses on immediate issues/tasks	Focuses on future possibilities
Directs and supervises	Engages and empowers people
Motivates through structure and rewards	Inspires by example and shared vision

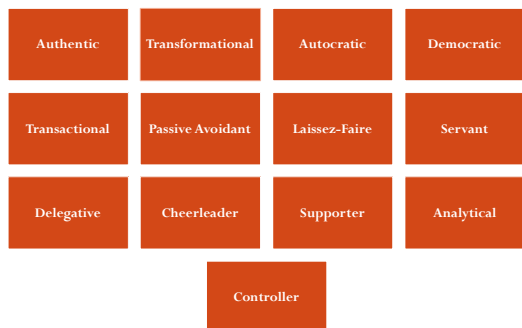
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Leadership Styles

- A case manager's methods, characteristics, and behaviors when directing, motivating, and managing others or situations.
- Shaped by factors such as:
 - Personality
 - Values
 - Skills
 - Training
 - Experiences
- We often have a dominant style of leadership.
 - May adapt various leadership styles depending on the situation.

10

Leadership Style Examples



11

Nine Essential Leadership Domains



12

Human Centered Care

13

13

Human Centered Care (HCC)

- A person-centered approach to healthcare that prioritizes the individual's needs, preferences, and values.
- Aims to empower people, their families, and their personal caregivers (support persons) to make informed decisions about their health and well-being.
- Means that the person's values and preferences are elicited, and once expressed, guide all aspects of their health care, supporting their health and life goals.

14

14

Care Based on Value

- Is not just about improvement in healthcare:
 - Quality and safety
 - Cost efficiency
 - Revenue
 - Incentives
- Rather, it is about:
 - Improving a person's health, well-being, and quality of life
 - Enhancing functioning and productive life - promoting independence
 - Applying a "wholistic" approach to health and human services in a person-centered care model

15

15

A unique way of thinking and doing ...

- A different culture and practice
- The person and family/caregiver are
 - at the center of decisions
 - they are experts
 - they are core members of the care team
- Consideration for the person's situation, health and social circumstance, lifestyle, desires, goals, and life experience
- Constant communication

16

16

IOM Six Aims of Quality Healthcare

1. Safe
2. Timely
3. Efficient
4. Effective
5. Equitable
6. Patient-Centered ~ Human (Person) Centered

17

17

National Quality Strategy



18

18

Why “Human” Not “Patient”?

Patient - Centered

- Primary focus is clinical or medical care
- Traditional care model with the provider as the ultimate decision-maker

VS

Human - Centered

- Encompasses the entirety of a person's needs and preferences
- Shifts the care model to support individual choice and autonomy in making care decisions

19

19

Human Centered Care Is ...

**Caring for the person with
an illness**

... ..

Not the illness of the person

20

20

Key Principles

Person-
Centered

Respect &
Dignity

Empowerment

Collaboration

Wholistic
Approach

21

21

Professional Case Manager Responsibility

- Ensures that case management services, resources, and care interventions:
 - Are specific to the liking of the individual client and support system
 - Meet the diverse characteristics of the client situation inclusive of the
 - Physical
 - Social
 - Financial
 - Psychological
 - Emotional
 - Cognitive
 - Support system
 - Health and wellbeing

22

22

Wholistic Case Management®

Wholistic Case Management®



Social Determinants of Health:
(Genetics, Lifestyle Behavior, Social Circumstances, Environmental and Physical Influences, & Medical Care)

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23

23

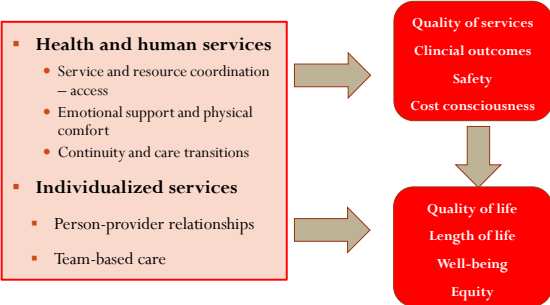
- Involving client/support system
- Inclusive of domains as pertinent to the practice setting
 - Medical
 - Cognitive
 - Behavioral
 - Social
 - Functional
 - Emotional
 - Financial
 - SDOH and HRSN

Focus on the evolving needs of the client identified over the duration of the professional case manager – client/support system relationship and across transitions of care

24

24

Impact of Human-Centered Care



25

Foundational Leadership Traits

26

Foundational Leadership Traits

- Empathic Engagement
- Client-Centered Advocacy
- Ethical Decision-Making

27

Empathy

- Is the ability to understand, share, and respond to the feelings and experiences of another person by imagining oneself in their situation.
- Involves seeing the world from the perspective, understanding of the other person's emotions.
- Leads to caring, compassionate, or helping behaviors.

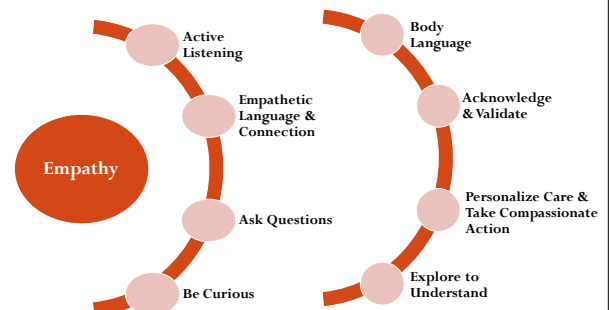
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Empathic Engagement

- Allows the professional case manager to:
 - Connect deeply with the client
 - Establish a bond that is built on understanding
 - Foster trust and therapeutic relationships
 - Prevent conflict
 - Effect desirable change and outcomes
- Is achieved by:
 - Having humanistic and unique behaviors with clients
 - Creating a quiet and engaging environment of care
 - Reducing client's fear, anxiety, and apprehension

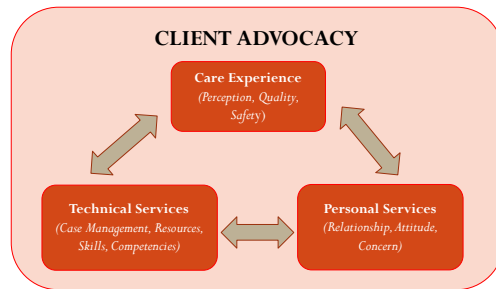
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Showing Empathy ...



30

Advocacy

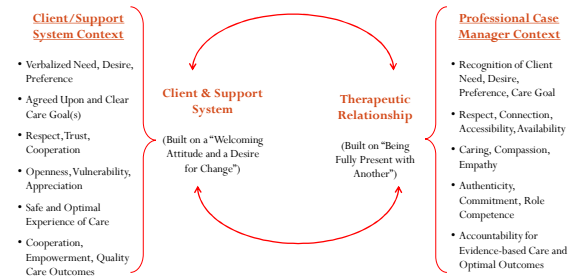


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31

31

Therapeutic Case Manager - Client Relationship



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32

32

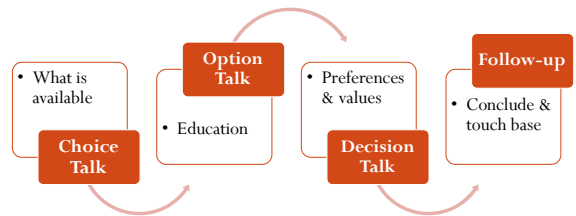
Ethics



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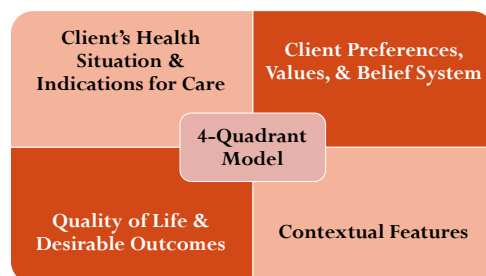
Shared Decision-Making



34

34

Ethical Decision-Making (Clinical)



35

35

Ethical Decision-Making Process

- Identify the ethical concern
- Gather information
- Identify key parties involved
- Engage experts
- Identify alternate action or solution
- Seek agreement
- Implement action
- Evaluate
- Revise action, if necessary

36

36

Impactful Relational & Communication Skills

37

Impactful Relational & Communication Skills

- Effective Communication
- Interdisciplinary / Interprofessional Collaboration
- Cultural Sensitivity and Competence
- Emotional Intelligence

38

Communication

- Good communication is **ESSENTIAL** to being successful in life.
- A key success factor in the communication process is to be **UNDERSTOOD**
- Why do we communicate?

Relationship Building	Task Completion
• Enjoyment • Belonging • Partnership	• Taking action • Surviving • Collaborating with others

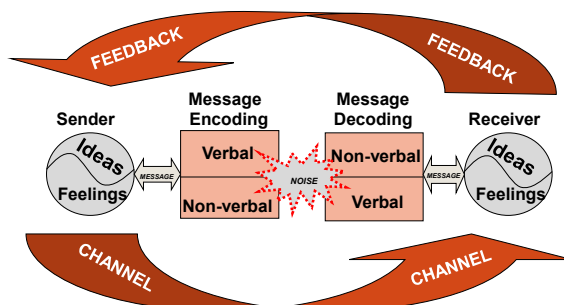
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Leadership Communication

- "...Leadership is simply human communication that modifies the attitudes and behaviors of others in order to meet certain goals ..."
- Meeting mutually agreed upon goals ensures success!!!
- Leadership success and productivity depend on developing effective communication skills
- Leadership competence increases with enhanced communication skills
- When it comes to communication ... "leaders are made, not born!"

40

Communication Model



41

Active Listening

- Anticipate where the conversation is heading
- Objectively weigh the evidence being presented
- Periodically summarize and reflect on others' ideas and feelings
- Do not interrupt
- Be non-judgmental
- Make open-ended inquiries
- Avoid premature closure



42

Mindset

Clues to Mindset	Growth Mindset	Fixed Mindset
Feedback	- Seeks feedback - Identifies feedback as a learning opportunity - Implements feedback	- Discouraged or defensive about constructive feedback - Believes present state is an immutable truth - May feel threatened when "identity" exposed
Goals	- Learning-oriented - Competency and mastery	- Performance-oriented - Outcomes, praise, or showing an ability
Motivation	Intrinsic	Extrinsic
Response to setbacks	- Bounces back through increased motivation - Adapts	- Gives up easily - Self-doubts after failure - Views error as a permanent deficiency - Makes excuses/blames others - May avoid new challenges

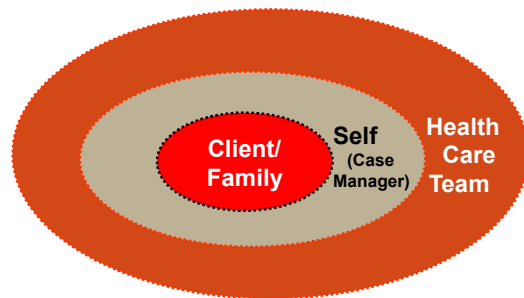
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Growth vs Fixed Mindset



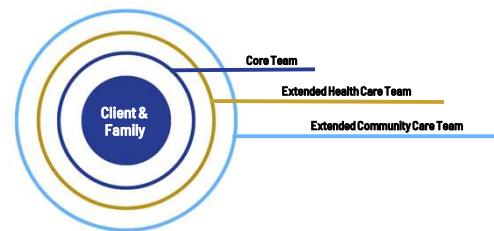
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Building Relationships



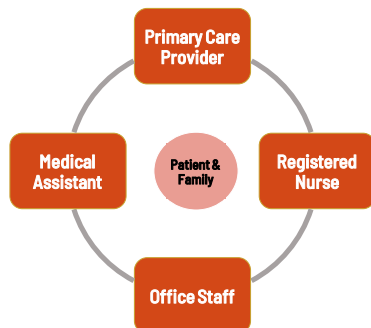
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The Care Team - Interprofessional



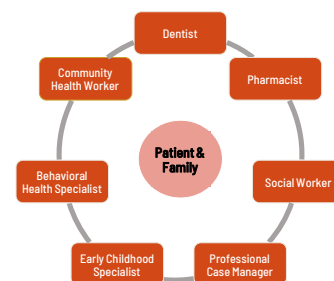
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Core Team Example - Ambulatory



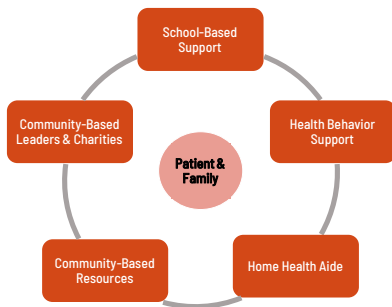
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Extended Health Care Team



48

Extended Community Care Team



49

Successful Teams

- Expertise and skills
- Client and family perspectives
- All team members work at top of license
- Working together toward shared goals
- Training in interprofessional approach to care
- Knowledge and appreciation of each member's role
- Workflows maximize effectiveness and efficiency
- Commitment to creating a psychologically safe environment
- Data-driven continuous improvement

50

50

Cultural Competence & Sensitivity

- Providing care that is individual and specific to the client's cultural beliefs, values, and practices.
- Important top take the time to understand your client and align with them based on their needs and desired care goals.
 - Orthodox Jewish patient can't use the call light on the Sabbath and needs someone to assist at all times.
 - Muslim client asks you not to interrupt during prayer time.
 - Jehovah's Witness client will not accept blood products but has hemoglobin of 4.9.
 - Spanish-speaking client refuses to use medical interpreter, preferring a family member to interpret instead.

51

51

Emotional Intelligence

- The ability to understand and manage one's emotions and recognize and influence those of others.
- The capacity to recognize these emotions is essential for motivating ourselves, and for managing emotions well in ourselves and in our relationships.
 - Necessary skill for effective leaders
 - Essential skill for case managers
 - Core skill for coping with and managing one's feelings and those of others (essential for conflict management)

52

52

Importance of EI

- EI provides us with an ability to:
 - motivate oneself and persist in the face of frustration
 - control impulse and delay gratification
 - regulate one's mood
 - keep distress from swamping the ability to work, to think, and to empathize
- EI matters -- SOCIAL COMPETENCE matters
 - Influence, communication, leadership, change facilitation, conflict management, collaboration and cooperation

53

53

EI and The Case Manager

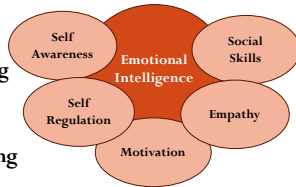
- EI enhances the case manager's ability in:
 - Making influential decisions
 - Resolving conflicts effectively
 - Communicating openly and honestly
 - Establishing trusting relationships
 - Building rapport with others
 - Creating an environment of teamwork
 - Effecting desirable outcomes

54

54

5 Components of EI

- Emotional Self-Awareness
- Self-Regulation-managing own emotions
- Self-Motivation, maximizing intellectual processing and decision-making
- Social Awareness- developing empathy
- Social Skills- building social relationships and managing the emotions in others



55

55

Complex Systems Thinking

56

56

Complex Systems Thinking

- Vision and Systems Thinking
- Accountability
- Commitment to Quality and Safety
- Outcomes Orientation and Management

57

57

Systems Thinking

- Case management is grounded in system's theory
- Case managers function in an interdependent team structure
- Case managers interact with their systems at various levels:
 - Individual
 - Team
 - Department
 - Organization
 - Across organizations
 - Society at large

58

58

Value of Systems Thinking

- Essential for the case manager's communications, especially in:
 - Managing decision making
 - Handling multiple and competing priorities
 - Dealing and coping with conflict
 - Motivating others
 - Effecting change and transformation
 - Facilitating negotiation activities

59

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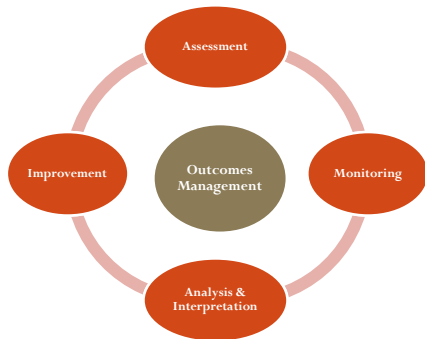
Accountability



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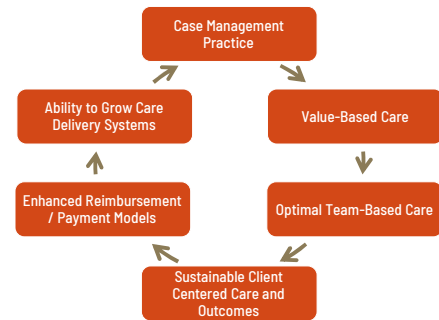
Outcomes Management Focus



61

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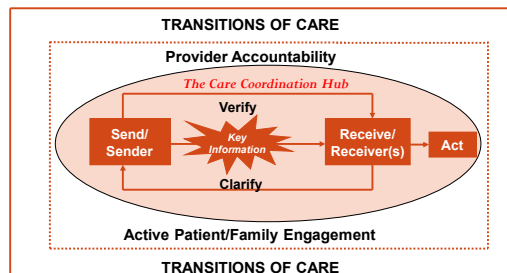
Impacting Outcomes



62

62

Transitions of Care



63

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Pay for Performance

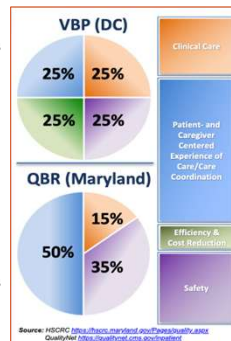
- **Patient Care: [The Patient and Family Experience]**
 - Deliver the highest quality and safest care, consistently and equitably
 - The right thing for the patient, and what patients and families expect
 - It is what we all want, why we are all here
- **Accountability: [Cost of Poor Quality / Pay for Performance]**
 - Risk Management (Lawsuits, Litigation & Settlements)
 - Pay for Performance Programs (State & CMS)
- **Reputation: [Transparency to the Public & Public Perception]**
 - CMS Star, Leapfrog, US News, etc.
 - Regulatory & Accreditation Processes (The Joint Commission)
 - Public Opinion / Word of Mouth

64

64

Hospital Pay For Performance

- Government reimbursement programs such as CMS use incentives based on one quality metrics to grade hospital
 - Value Based Purchasing
 - Quality Based Reimbursement
- Reimbursement is dependent on how well hospitals meet various criteria in each domain
- Case managers impact many domains including transitions of care



65

65

Organizational & Adaptive Competence

66

66

Organizational & Adaptive Competence

- Organizational Skills
- Critical Thinking & Clinical Decision Making
- Problem Solving and Conflict Resolution
- Adaptability and Resilience

67

67

Complexity of Role Responsibilities

- | | |
|--|--|
| <ul style="list-style-type: none"> ▪ Clinical care management <ul style="list-style-type: none"> ▪ Care planning ▪ Care coordination ▪ Documentation | <ul style="list-style-type: none"> ▪ Outcomes management <ul style="list-style-type: none"> ▪ Quality and safety ▪ Delays management ▪ Value based care |
| <ul style="list-style-type: none"> ▪ Transitions of care <ul style="list-style-type: none"> ▪ Discharge planning ▪ Post-acute care and resources | <ul style="list-style-type: none"> ▪ Utilization management <ul style="list-style-type: none"> ▪ Utilization review ▪ Denials & appeals ▪ Revenue Cycle ▪ Capacity management |

68

68

Organization & Time Management

- | | |
|---|---|
| <ul style="list-style-type: none"> ▪ Time ▪ Competing priorities ▪ Multi-tasking ▪ Caseloads ▪ Documentation ▪ Delays management ▪ Risk management | <ul style="list-style-type: none"> ▪ Quality & safety ▪ Reimbursement ▪ Client experience ▪ Readmissions ▪ Communication ▪ Health education ▪ |
|---|---|

69

69

Diverse Skills

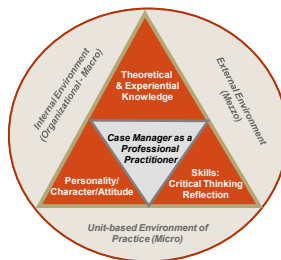


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Critical Thinking & Clinical Reasoning

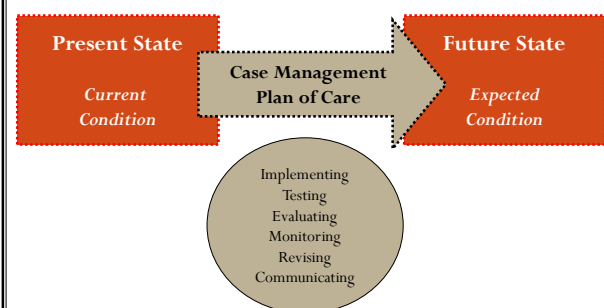
- Enables case managers to synthesize information, anticipate challenges, and craft individualized, evidence-based and interdisciplinary plans of care for their clients.
- Allows for the case managers' effective decision-making



71

71

Reasoning & Decision-Making

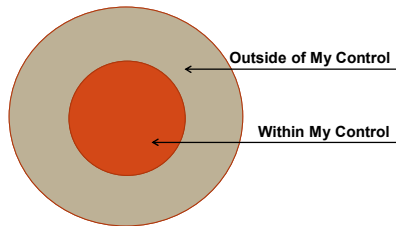


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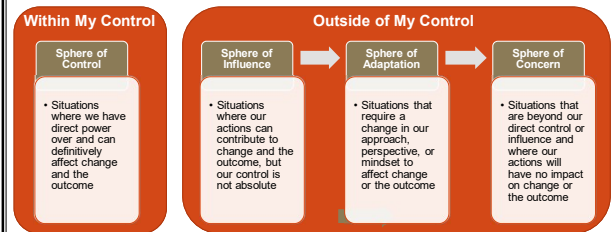
Problem Solving & Conflict Resolution

Understanding Spheres of Influence



73

Spheres of Influence



74

74

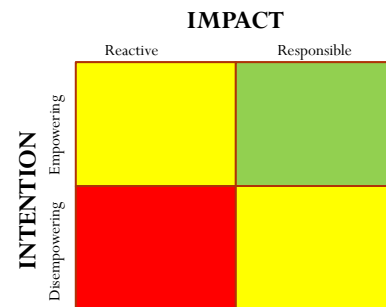
Intent vs Impact



75

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Be Intentional

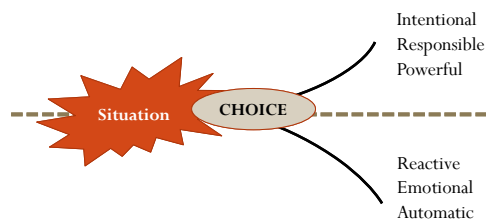


76

76

It Is About Choice

Responsibility vs. Emotion/Feelings



77

77

Adaptability & Resilience

- Commitment – Two Sides of Same Coin
- It is up to me to have it turns out

Intentionality
Responsibility
Authenticity
Vulnerability
Transformation

VS

Automatic
Reactionary
Blaming
Righteousness
Looking Good

78

78

Sense of Self

- Know yourself
- Be aware of “self talk”

Responsible Attitude

- I can, I know
- What a great opportunity
- I would like help/assistance

Reactive Attitude

- I can't, I don't know
- Why change, we always did it this way
- No one told me

79

79

Resource Awareness & Management

80

80

Resources Awareness & Management

- **Cost-Conscious Decision-Making**
 - Care planning
 - Post-acute services
 - Life care planning
- **Utilization management**
 - Concurrent and retrospective
 - Contractual procedures
 - Denials and appeals management
- **Revenue cycle**

81

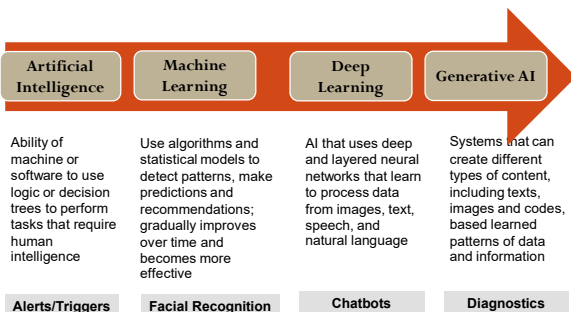
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Digital Literacy and Artificial Intelligence

82

82

Artificial Intelligence (AI)



83

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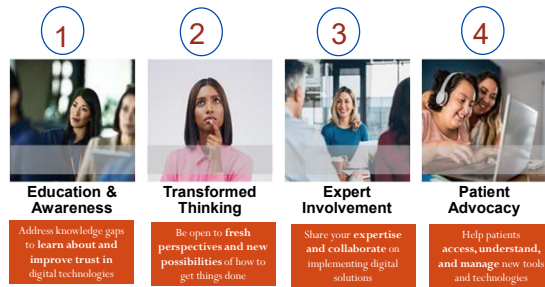
Digital Literacy and Artificial Intelligence

- **Innovation in case management practice is diverse**
 - Program enrollment and case prep
 - Client contact
 - Customized health education
 - Care plan coordination
 - Virtual post-discharge communications
 - Support post-discharge
 - Clinical quality audits
 - Utilization management: notifications, appeals

84

84

Developing Competency



85

Role Responsibilities

- Evaluate the recommendations of automated tools before you act
- Highlight positive outcomes and improvements in patient care
- Maintain clients' trust; provide clear communication about how AI is used, its limitations, and the benefits it brings
- Assess patient's digital health literacy and act
- Ensure ethical use, minimize bias, and maintain patient privacy
- Incorporate social determinants of health and social care needs
- Stay informed and educated; understand AI limitations
- Collaborate with technology experts and IT professionals; speak up and share your thoughts

86

Personal Growth & Advancement

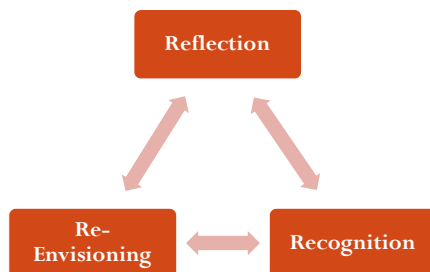
Personal Growth & Advancement

- Stay current with peer-reviewed and evidence literature
- Apply research findings in your practice
- Collect and analyze outcome data
- Participate in quality improvement
- Contribute to research and scholarship
- Own your professional growth and advancement

87

88

Framework for Professional Development



89

Reflection

- Pause and examine current state of your practice
- **knowledge, skills, and competencies**
 - What is current & optimal? what aspects need refreshing? what new practices you have not yet adopted? what changes you must adopt?
- **Outcomes of your practice**
 - The impact of your role and responsibility on the people you care for individually and collectively.
 - Where and how have you have been successful and effective?
 - Where are you lagging?
 - And how will you seek to address the gaps you identify?
- **Support you have in your environment that helps you advance your professional practice and stature.**

90

Recognition

- **A time to pause and celebrate your achievements, value, and status as a professional case manager.**
 - Your practice
 - Having been a stand for everyone receiving the best and timely health and human services they deserve
- **Identify your practice areas (knowledge, skills, competencies) that will benefit from continued improvement, growth, advancement, or transformation.**
 - Be clear where and how you can address these gaps
 - Act urgently

91

91

Re-Envisioning

- **Examine the state of your life purpose or intention (professional role and career) for the deliberate task of recharging, recalibrating, revising, or reimagining.**
- **Take a pause - revisit where you are and what you have achieved.**
- **Decide about specific aspects that will benefit from intentional change.**
- **Imagine a bright, successful, and valuable future for yourself and others.**
 - Re-envision your professional case management practice
 - Where are you relevant to your vision?
 - Identify different ways of exercising your role and responsibility with the aim of improving or transforming them
 - Update your goals

92

92

Commitment for Professional Advancement

- **Take the initiative and be responsible for your ongoing learning and professional advancement**
- **Your professional career vision is your own responsibility**
 - Invest in getting it accomplished – be intentional
 - Seek opportunities that expand your knowledge and skills, and enhance your visibility and role identity
 - Seek the support of others when necessary and offer your support to others as well – mutual expectation
- **Revisit your vision frequently and modify as necessary**
- **Practice vulnerability**
- **Demonstrate an inspiring and powerful presence, and responsible attitude**

93

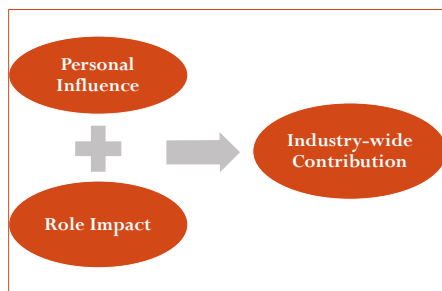
93

Expression of Value

94

94

Expression of Value



95

95

Personal Influence – Personal Values

- **Value on a personal level comprises the beliefs and principles that one considers important, especially in the way they live, work, and relate to others.**
- These values guide decisions and actions which then contribute to the case manager's personal influence.
- They make the case manager's character and qualify their personal approach to patient care delivery and the building of therapeutic relationships.
- They also affect the context of executing the case manager's role responsibilities at the individual patient level and how they influence patient care outcomes.

96

96

Person-Related Values

- | | | |
|------------------|--------------------------|-------------------|
| • Accountability | • Emotional Intelligence | • Organization |
| • Accessibility | • Empathy | • Ownership |
| • Advocacy | • Equity | • Patience |
| • Achievement | • Equality | • Resilience |
| • Caring | • Ethics | • Resourcefulness |
| • Commitment | • Excellence | • Respect |
| • Compassion | • Independence | • Responsibility |
| • Competence | • Integrity | • Stewardship |
| • Confidence | • Justice | • Success |
| • Connection | • Leadership | • Transparency |
| • Discipline | • Learning | • Trust |

97

97

Role-Related Values

- Evident in care provision and in leading a team of healthcare professionals including case managers' peers.
- Demonstrate value to the practice environment where case managers operate (employer-based or position-driven).
- Contributions are numerous; some directly relate to patient care while others focus on the case management program or department itself.

98

98

Role-Related Impact

Client Care- Based Impact

- Interdisciplinary healthcare team collaboration across care settings.
- Active participation in patient care conferences, case reviews, and team meetings, especially when needing to resolve conflict.
- Sharing of valuable insights and expertise to ensure that patients receive comprehensive and coordinated care interventions.
- Serving as liaisons between clients, providers, and payers.
- Smooth transitions of care while promoting care continuity across healthcare settings.
- Clear, simple, and open communication with clients and their families, including health instruction.
- Advocacy and addressing concerns or questions to foster trust and confidence.

Case Management Department-Based Impact

- Sharing outcomes on key performance measures with various stakeholders.
- Development of policies, procedures, standards, or tools to enhance case management practice & outcomes.
- Engagement in education, training, research and quality improvement activities
- Leveraging data and outcomes to demonstrate the impact of case management services.

99

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Industry Wide Value

- Pertains to the practice of case management at large; is complex and challenging.
- Impact at an industry level is far reaching and may extend regionally, nationally, and perhaps globally.
- Demonstrate greater influence, broader reach, wider recognition, and larger benefit.
 - Engaging in scholarly work is crucial to advancing professional practice, case management body of knowledge, best practices, evidence-based care, innovation, and the science that supports our work, disseminating experiences of innovation and scientific.
 - Communicating our value to the public and to the industry at large is essential for raising awareness about case management.

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Professional Case Manager's Value

Leadership	Service	Advocacy	Education & Professional Development	Science & Scholarship
• Standards of practice • Future of the practice • Care model innovation • Department design & structure	• Professional organizations • Volunteer & community service • Public health education	• Health & public policy • Legislation & advocacy with policy makers/lobbyists • Testimonials • Accreditation	• Orientation & competencies • Academic collaborations • Coaching & mentoring • Continuing education	• Research • Quality improvement • Publications • Public speaking • Innovation

101

101

Any Questions?



102