

The workbook

Physician alignment, engagement, and retention

A self-assessment and action-planning
guide for healthcare executives



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Section 1

Introduction: Lead with intention

Purpose of this workbook

This workbook is designed to help healthcare executives assess their organization’s current approach to physician alignment, engagement, and retention and identify practical steps to strengthen each area.

It transforms the insights from CHG Healthcare’s Physician Alignment, Engagement, and Retention Roadmap into guided exercises, checklists, and reflection activities you can use with your leadership team.

How to use this workbook:

- Complete each section individually or as a team.
- Review your results holistically—alignment, engagement, and retention influence one another.
- Answer each question honestly and with a critical lens. This will yield the best results.
- Revisit your answers annually to measure progress and maintain momentum.

“

We cannot solve our problems with the same thinking we used to create them.

—Albert Einstein

Section 2

Physician alignment: Building shared purpose

Alignment happens when physicians share and support your organization’s mission, vision, and values, working toward common goals rooted in trust and transparency. Sustained alignment depends on physicians’ trust that executive leadership is acting in the best interests of patients, clinicians, and the organization as a whole.

Each of the following areas helps drive alignment. Use the **strategic reflection** questions to prompt thought, then complete the **checkup**.

Culture

Strategic reflection

What is your value proposition to current and prospective physicians, and what truly makes your organization unique and attractive as a place to practice medicine?

“Culture outperforms strategy every time; and culture with strategy is unbeatable.”
—Quint Studer

Checkup

	Yes	No
Does your organization conduct an annual engagement survey?		
If so, do you include specific questions regarding your organization’s culture?		
Do you also conduct pulse surveys throughout the year?		
Does your organization regularly implement action plans to improve engagement scores?		
Have you implemented any new policies or changes in response to engagement results?		
Do you incorporate your mission, vision, and values into day-to-day patient care, including your evaluation process?		

Results

0 - 2 “Yes” responses: Consider requesting input from your staff more frequently and then transparently implement changes in response to that input. Establish a regular survey cadence and ensure leaders are visibly accountable for acting on results.

3 - 4 “Yes” responses: You have a basic engagement feedback process in place. Ensure the input you request is frequent, includes meaningful culture measures, and that you have a clear plan to review results and implement changes consistently across the organization.

5 - 6 “Yes” responses: You’re on the way to creating a strong workplace culture where staff feel appreciated and that their input matters. Maintain your survey rhythm, tie results to visible actions, and continue to embed mission, vision, and values into daily care and evaluation practices.

Follow-up reflection

✓ What processes or actions can you implement to improve your score?

Executive leadership

Strategic reflection

On a scale of 1 to 10 (with 10 being the highest), how would your physicians rate their trust of your executive leadership?

Checkup

	Yes	No
Does your engagement survey include questions about trust and alignment with your executive leadership?		
Do you have a clear and compelling vision that reframes what winning looks like, and is it owned by the whole enterprise?		
Do physicians know how they help the organization win?		
Do you utilize a dyad model of leadership, partnering a physician with an administrator?		
Is your executive team the right size, comprising people with complementary skills and characterized by an “enterprise first” mindset?		
Have you built trust with your physicians by being “radically transparent” and showing an interest in their views?		
Does your executive team round on a regular cadence?		
Do they partner on follow-up, concerns, and questions?		
Does your executive team conduct regional town halls?		

Results

0 - 3 “Yes” responses: Start strengthening trust and alignment between physicians and executive leadership by clarifying the enterprise vision, increasing visible executive presence with physicians, and creating more consistent two-way communication with follow-through.

4 - 6 “Yes” responses: You are starting to build alignment and trust-building practices. Ensure your leadership vision and physician partnership model are consistent across the enterprise and tighten your feedback loops so physicians see transparent action on their input.

7 - 9 “Yes” responses: You’re building a highly aligned, trust-based leadership culture where physicians understand the vision, feel partnered with executives, and see leaders acting on what matters to them. Continue to reinforce these behaviors and identify any remaining gaps in consistency or visibility across regions and specialties.

Follow-up reflection

- ✓ How does the score you gave in the **strategic reflection** question above compare to the actual score physicians give in your engagement surveys? If they aren’t they same, what is causing the disconnect?
- ✓ What processes or actions can you implement to improve your score?

“*Building trust does not require a roadmap but a commitment to behaviors in every interaction across the organization.*

—Scott Polenz, CEO at Oakleaf Surgical Hospital

Communication

Strategic reflection

Does your communication with physicians, staff, leaders, and community members consistently lead with your mission, vision, values, and the “why” behind your work?

“Communication is not about great looking PowerPoint slides or a wonderfully written memo. It is about connection. It is about authenticity. It is about transparency. It is about being real and humble.

—Scott Polenz, CEO at Oakleaf Surgical Hospital



Checkup

	Yes	No
Do you have a formal physician communication plan?		
Does your organization have the support of an internal communications team to assist with physician communications, even if on just a consultative basis?		
Does your organization have a regular newsletter, email, meeting, or other way of communicating formally with physicians?		
Do you carefully consider what information your physicians need or want to know?		
Are your communications with physicians reactive or proactive?		
Do you enhance your communications with engaging stories that are relevant to physicians?		

Results

- 0 - 2 “Yes” responses:** Build a more intentional and consistent physician communication approach. Start by creating a formal plan, identifying what physicians most need to know, and shifting from reactive updates to proactive, reliable communication.
- 3 - 4 “Yes” responses:** Your communication strategies are improving. Ensure they are coordinated under a clear plan, supported where possible by internal communications expertise, and focused on what physicians care about most—delivered proactively with a clear purpose.
- 5 - 6 “Yes” responses:** You’re creating a strong physician communication ecosystem where messaging is consistent, physician-centered, and proactive. Keep reinforcing your plan, maintain regular channels, and continue using relevant stories to strengthen connection and trust.

Follow-up reflection

- ✓ What processes or actions can you implement to improve your score?

Physician voice and leadership

Strategic reflection

Do your decision-making processes include input from practicing physicians on issues that impact patient care? If not, what’s preventing their involvement?



Checkup

	Yes	No
Do you involve physicians in key decisions that will impact their practice in the ambulatory and/or hospital settings?		
When you implement a change in a clinical setting that will impact your physicians, are the communications led by physician to physicians?		
Do you have a formal physician leadership development program?		
Do you have a formal process to identify future physician leaders?		
Do you assess the impact of physician leadership on patient care and satisfaction?		
Do you track key performance indicators to assess the effectiveness of physician leadership?		

Results

0 - 2 “Yes” responses: Begin strengthening physician involvement and leadership infrastructure by creating formal pathways for physicians to shape decisions, developing physician-to-physician communication for clinical change, and establishing a basic leadership development and succession process.

3 - 4 “Yes” responses: You have some physician engagement and leadership practices in place. Ensure they are formalized and consistent, with clear processes for involving physicians in decisions, building future leaders, and measuring leadership impact through defined indicators.

5 - 6 “Yes” responses: You’re creating a strong physician leadership culture where physicians influence key decisions, communicate change effectively to peers, and are supported through development and succession planning. Continue to reinforce these systems and track outcomes to sustain and scale leadership effectiveness.

Follow-up reflection

✓ What processes or actions can you implement to improve your score?

Section 3

Physician engagement: Fostering connection and belonging

Engagement reflects how connected physicians feel to their organization. It’s built on belonging, empowerment, and trust.

Each of the following areas helps foster engagement. Use the **strategic reflection** questions to prompt thought, then complete the checkup.

Onboarding

Strategic reflection

Would a physician have a different onboarding experience at one hospital or region within your system vs. another? If yes, why?

“Physician onboarding isn’t a formality. It’s a cultural lynchpin.”
—American Medical Association



Checkup

	Yes	No
Do you have a formal onboarding program in place across your whole system of care?		
Do you have one person or team who “owns” the onboarding program?		
Do you conduct an onboarding survey for the physician as well as the hiring department and leadership?		
Do you hold local/regional leadership accountable for fulfilling their elements of the onboarding experience?		
Is executive leadership supportive of the onboarding program?		
Do you have any activities for the physician’s family to help welcome and orient them to the community?		
Is there a social component in your program?		

Results

- 0 - 3 “Yes” responses:** Consider formalizing and strengthening your physician onboarding experience across the system. Start by assigning clear ownership, establishing a consistent program and survey process, and ensuring leaders understand and follow through on their onboarding responsibilities.
- 4 - 5 “Yes” responses:** You’ve given some thought to onboarding. Ensure the program is standardized systemwide, has a clear owner, includes feedback from physicians and departments, and that local/regional leaders are held accountable for delivering the full experience.
- 6 - 7 “Yes” responses:** You have a strong, welcoming onboarding program that supports physicians, aligns leaders, and improves early retention. Continue to reinforce executive support, maintain consistent accountability, and incorporate family and community-oriented activities to deepen connections and foster a sense of belonging.

Follow-up reflection

- ✓ What processes or actions can you implement to improve your score?

Work-life balance and flexibility

Strategic reflection

Does your organization support physician work-life balance through flexible scheduling and sustainable workloads?

“*The practice of medicine is an art, not a trade; a calling, not a business; a calling in which your heart will be exercised equally with your head.*

—William Osler

Checkup

	Yes	No
Does your organization have a formal flexible-scheduling program?		
Does your organization formalize the flexible program for fairness and consistency across your organization?		
Does your organization have an offboarding program for physicians getting closer to retirement?		
Does your organization offer parental leave and/or childcare services?		
Has your organization recently reevaluated your paid time off benefit package?		
Could you be more generous in what you offer, including floating holidays, sick time, or volunteer time off?		
Do you have structures and/or programs in place to support physicians when they do take time off?		

Results

0 - 3 “Yes” responses: Work on supporting work-life balance and flexibility for physicians. Start by formalizing fair scheduling and leave practices, reevaluating PTO and family benefits, and establishing basic structures that help physicians truly disconnect and receive support when away.

4 - 5 “Yes” responses: You have some flexibility and benefit practices in place. Ensure these programs are formalized for consistency, revisit time off and parental/childcare benefits regularly, and create clearer supports for coverage and reintegration when physicians take time off or approach retirement.

6 - 7 “Yes” responses: You’re on the way to creating a physician-first culture where scheduling, leave, PTO, and offboarding are consistent and supportive. Reassess benefits regularly to stay competitive and ensure physicians feel fully supported before, during, and after time away.

Follow-up reflection

✓ What processes or actions can you implement to improve your score?

Operational efficiency

Strategic reflection

How does your organization empower physicians to be leaders in operational improvement, rather than just being asked to adapt to change?

Checkup

	Yes	No
Do you optimize physician time by minimizing unnecessary tasks and focusing efforts where they're most impactful?		
Do you have efforts to reduce administrative paperwork for clinicians?		
Do you simplify health information management (HIM) to support efficient, accessible care?		
Do you streamline the patient intake process to improve the experience for both patients and physicians?		
Do you support strong care collaboration to improve patient outcomes?		
Do you choose technology partners that understand and prioritize clinical efficiency and outcomes?		
Do you truly involve physicians in task forces or initiatives focused on operational efficiency?		
Do you use an EHR system designed with clinician workflows and ease of use in mind?		

Results

0 - 3 "Yes" responses: Operational efficiency is essential for physician engagement. Identify the biggest time-wasters in clinician workflows, reduce administrative burden, and involve physicians directly in redesigning processes and technology choices.

4 - 5 "Yes" responses: You have some efficiency-focused practices implemented. Ensure these efforts are coordinated and consistently physician-led, with clear goals focused on reducing low-value tasks, enhancing intake and HIM workflows, and selecting technology that supports clinical ease and outcomes.

6 - 8 "Yes" responses: You're making headway on creating a highly efficient clinical environment where physician time is respected, workflows are streamlined, and technology supports care delivery. Continue to request physician involvement in efficiency initiatives and remove friction points that detract from patient care and clinician well-being.

Follow-up reflection

✓ What processes or actions can you implement to improve your score?

“ *I think a lot of docs feel that ‘I went to medical school, I did the training, I understand how to take care of patients,’ and now there is a push for doing something a certain way because it is less expensive or some government program has said that this arbitrary quality marker is important.*

—KrisEmily McCrory, MD

Collegiality and socialization

Strategic reflection

Does your organization believe in and tie socialization and collegiality to patient retention?

“More than ever, the social leadership of the right brain (inspiring and motivating) are what gives others hope.

—Gary Burnison, CEO, Korn Ferry



Checkup

	Yes	No
Do you have a formal social programs team focused on getting physicians together outside of work?		
Are there social events (dinners, retreats, etc.) sponsored and attended by executive leadership?		
Do you have social gatherings (virtual or face-to-face) across your system to promote collegiality and internal education on services offered to promote/expect internal referrals?		
Do you support strong care collaboration to improve patient outcomes?		
Does your organization have a formal program for spouses or partners?		
Do you have a formal mentoring program for new physicians?		
Does your onboarding program include new physician meet and greets?		

Results

- 0 - 2 “Yes” responses:** You can make small changes that strengthen the social and collegial infrastructure that helps physicians feel connected to each other and to leadership. Design a few intentional, systemwide touchpoints—such as mentoring, meet-and-greets, and leadership-sponsored gatherings—that build relationships beyond daily clinical work.
- 3 - 4 “Yes” responses:** Your social connection plans are working but could be strengthened. Ensure that these efforts are formalized and consistent throughout the system, with visible executive participation, clear mentoring and spousal support programs, and events that reinforce collaboration and internal collegiality.
- 5 - 7 “Yes” responses:** Your organization has a strong physician community where collegiality, mentoring, and leadership presence foster a sense of belonging and collaboration. Maintain this by offering regular social and educational gatherings, and continuing to build connections that support retention and internal alignment.

Follow-up reflection

- ✓ What processes or actions can you implement to improve your score?

Section 4

Physician retention: Sustaining your talent

Retention is the result of everything your organization does for physician alignment and engagement, but it also requires deliberate attention to growth, well-being, compensation, and appreciation.

Each of the following areas helps with physician retention. Use the **strategic reflection** questions to prompt thought, then complete the checkup.

Professional growth and development

Strategic reflection

Do you have ongoing programs and conversations with your physicians about their professional development and/or interest in leadership positions?

“While the journey seems long and hard at the beginning, with perseverance and dedication, the rewards last a lifetime.

—Dr. William R. Francis

Checkup

	Yes	No
Do you have a formal mentorship program?		
Do you identify physicians with leadership potential and work to shape them as future leaders?		
Do you have a formal physician leadership development program?		
Is your CME budget competitive?		
Do you have formal internal clinical educational programs for your physicians to partake in and learn from one another?		
Do you conduct an annual evaluation of your physicians?		
Do all your physicians have a formal professional development system in place?		

Results

0 - 3 “Yes” responses: Reinforce your physician development and growth infrastructure by formalizing mentorship and leadership pathways, ensuring CME support is competitive, and creating consistent systems for evaluation and professional development.

4 - 5 “Yes” responses: Physician development opportunities exist but could be improved. Offer mentorship, leadership identification, and education programs, and make them accessible across the organization. Confirm that CME and evaluation processes are strong enough to support long-term physician growth.

6 - 7 “Yes” responses: You have a strong physician development culture where mentorship, education, leadership preparation, and professional growth are clearly supported. Continue to invest in competitive CME offerings and ensure development systems remain consistent and meaningful for every physician.

Follow-up reflection

✓ What processes or actions can you implement to improve your score?

Well-being

Strategic reflection

How effectively does your organization promote and support the well-being of physicians and staff across all levels, and who leads these efforts?

“Physicians’ ability to see their own values represented in the work that they do is a significant factor in feeling as though they are making a positive difference in the world.

—Behavioral Health & Wellness Program, University of Colorado Anschutz Medical Campus School of Medicine

Checkup

	Yes	No
Does your organization have a formal well-being structure and program led by a chief well-being officer or other executive?		
Does your organization have a dedicated budget for physician well-being?		
Do you have mental health resources available to your physicians, and are they encouraged to use them?		
Are there operational challenges at your organization that could be contributing to physician frustration and burnout?		
Do you have a physician-led well-being committee?		
Do you collect feedback from physicians about their well-being?		

Results

- 0 - 2 “Yes” responses:** Supporting physician well-being is necessary if you want to retain them. You can do this by establishing clear executive ownership, dedicating resources and budget, and creating regular, trusted ways for physicians to share well-being concerns and see visible follow-through.
- 3 - 4 “Yes” responses:** You have some well-being elements in place. They should be coordinated under a formal structure with physician leadership involvement, sustainable funding, and consistent feedback methods that identify root causes of burnout and drive operational improvements.
- 5 - 6 “Yes” responses:** Your organization has given thought to creating a strong physician well-being culture where support is structured, funded, physician-led, and responsive to real needs. Continue to reinforce these systems, sustain access to mental health resources and encouragement, and address operational pain points that contribute to burnout.

Follow-up reflection

- ✓ What processes or actions can you implement to improve your score?

Compensation and incentives

Strategic reflection

How well does your current compensation model motivate physicians to advance your organization’s priorities, and what changes could better align incentives?

“ People pay the doctor for his trouble; for his kindness, they still remain in his debt.

— Seneca

Checkup

	Yes	No
Do you have a documented compensation philosophy, and does it align with your strategic plan?		
Do your physicians adapt and succeed when they transition from a guaranteed salary to productivity-based compensation?		
Does your compensation model incentivize physicians to improve patient outcomes, reduce costs, and enhance the patient experience?		
Does your compensation model address the challenges of physician burnout, work-life balance, and engagement?		
Do you have a plan to adapt the compensation model to changing reimbursement models and regulatory requirements?		
Do you have a compensation committee with physician involvement and input?		
Do you survey physicians on how they feel about the current compensation model?		

Results

0 - 3 “Yes” responses: Reevaluate your physician compensation approach to ensure it supports strategy, sustainability, and physician trust. Clarify a compensation strategy and involve physicians in any redesign. Additionally, it’s important to address burnout, patient outcomes, and reimbursement shifts in a more intentional way.

4 - 5 “Yes” responses: Your compensation fundamentals are solid. Make sure your philosophy and model are clearly tied to strategy, that physicians are supported through compensation transitions, and that incentives and governance reflect outcomes, engagement, and evolving reimbursement realities.

6 - 7 “Yes” responses: You’ve put in the effort to create a strong, future-ready compensation model that aligns with strategy, supports physician success, and reinforces outcomes, experience, and engagement. Continue your success by monitoring transition impacts and adapting your model as reimbursement and regulatory expectations change.

Follow-up reflection

✓ What processes or actions can you implement to improve your score?

Recognition

Strategic reflection

When is the last time you and your executive teammates said these simple but powerful words to one of your practicing physicians: “Thank you, Dr. X”?

“*Recognition is not a scarce resource. You can’t use it up or run out of it.*”
—Anonymous



Checkup

	Yes	No
Do you have formal recognition programs for your physicians?		
In your engagement surveys, do your physicians say they feel valued and recognized throughout their careers?		
Do you hold an annual awards program for your physicians?		
Does your organization provide opportunities for non-clinical employees to recognize physicians?		
Do executive leaders in your organization make it a regular habit to express appreciation to physicians in writing?		
Do you find opportunities to recognize physicians for their work in your organization’s communications channels?		

Results

- 0 - 2 “Yes” responses:** Physician retention is closely tied to how your organization recognizes and values physicians. You’ll need to formalize recognition programs, increase visible executive appreciation, and create more consistent opportunities for peers and non-clinical employees to acknowledge the contributions of physicians.
- 3 - 4 “Yes” responses:** You’re working on getting a recognition program underway. Recognition initiatives should be meaningful across the organization, supported by regular executive appreciation, and reinforced through multiple channels where physicians see their impact acknowledged over time.
- 5 - 6 “Yes” responses:** You’ve given thought to making a strong recognition culture where physicians feel valued throughout their careers and feel their contributions are consistently celebrated. Keep it up with formal programs, maintain regular executive and peer recognition, and continue to highlight physician impact through awards and communication channels.

Follow-up reflection

- ✓ What processes or actions can you implement to improve your score?

Section 5

Integrating efforts: The office of physician relations

A dedicated office of physician relations can serve as a one-stop resource for all physician needs and questions, including onboarding, well-being, compensation, and leadership development.

Exercise

Create a visual map of how physicians currently navigate the system when they need help or answers.

Where are there redundancies or confusion points?

Brainstorm three ways to centralize support.

Section 6

Conclusion: From insights to action

Now it's time to take what you've learned and translate it into action. For each main section, write down your top opportunity for change, the next steps, who is responsible for this action, and the target completion date.

Alignment

Top opportunity	
Next step	
Responsible party	
Target date	

Engagement

Top opportunity	
Next step	
Responsible party	
Target date	

Retention

Top opportunity	
Next step	
Responsible party	
Target date	

Final reflection

- ✓ What surprised you most as you completed this workbook?
- ✓ How will you keep momentum over the next year?

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About CHG Healthcare

As the nation's leading physician workforce experts, CHG Healthcare makes it possible for over 20 million patients to access timely, high-quality care through our network of providers and partners each year. CHG created the locum tenens industry, and we have continuously evolved and transformed it for more than forty years. Far beyond locum tenens, our solutions span the clinical workforce spectrum, including permanent and temporary staffing, technology, and strategic advisory support. Headquartered in Salt Lake City with offices nationwide, CHG is consistently recognized as a top workplace for its culture of care, growth, and purpose. We are committed to making a difference in the lives of those we serve: healthcare organizations, clinicians, our employees, and communities alike. Find out how at chghealthcare.com.

Are there areas related to physician engagement and retention you'd like to improve within your organization? CHG Healthcare Advisory Services can help. Contact **866.570.9920** or advisoryservices@chghealthcare.com.