# Creative Strategies for Workforce Challenges in Health Care

Health care organizations are struggling to find the right talent, manage special projects, and streamline processes. Join us for an **on-demand** webinar on workforce disruption as we discuss creative strategies for addressing workforce challenges in the current market.

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**Here is a transcription of this session:**

Ron Kain:

Good morning, perhaps, good afternoon, depending on where you're joining us from. I'd like to welcome you to Creative Solutions to Workforce Challenges presented by CLA. My name is Ron Kain. I'm a principal here in our healthcare practice, and I will be your moderator for today's presentation. For those of you who may not be familiar with CLA, we are one of the top 10 professional services firms in the US with over 120 locations nationwide and we support a wide range of industries with audits, excuse me, consulting and outsourcing digital tax and wealth advisory services.

Ron Kain:

Move over here to this next slide. This is just legal disclaimer that says that the information is general in nature. If you have any specific questions, feel free to reach out to one of the presenters. We'd be happy to have a chat with you or give you some additional information [inaudible 00:01:05] concerns the presentation today. I'm going to be joined today by our presenters, Jon Fagan, Trevor Smith, and Matt Anderson, along with myself who would be serving issue moderator, as I said. So the learning objectives for today's call are to outline inventive practices for building a culture that attracts and retains top talent in a competitive market. Identify new ways, automation can help with staffing flexibility. Recognize opportunities to implement alternative staffing strategies to support business operations and reduce, not increase, reduce stress on your team and identify opportunities to automate or outsource routine complex tasks so that your staff can focus on strategic initiatives. So without further ado, I will hand it over to Jon.

Jon Fagan:

Ron, thank you so much and good morning to our audience. As the numbers climb, super excited to spend some time with you all this morning. Very excited to talk about where recruitment starts, especially in this climate that we all find ourselves in. So going to walk through a couple of things that we're seeing with our clients in the marketplace. I'm going to talk a little bit about recruitment, retention, attainment. So thanks for joining us here. So where do we start? Where does recruitment start? So we have found that organizational culture is a great place to start looking into your brand and what it is that you're known for. So what are you famous for? What do you do better or more creatively? How do you sell your brand and the opportunity? Are you a commodity or are you custom?

Jon Fagan:

So with the candidates or applicants that you and your organization plan to move forward in your process, the candidate experience is still everything. It's everything from that first touch. And it directly impacts retention even in the early stages. It's important when we're working with candidates to introduce them to our organization, to the opportunity that they may be interviewing for, keep building that relationship from that first touch. It's absolutely critical. We all understand it can be challenging to pull together a huge slate of interview agendas and schedules, whether you're interviewing for a staff accountant role or a chief human resources officer role. There's a lot of people within your organization that are going to be involved in that process. By overcommunicating with your candidates, they are kept in the know every step of the way. Please also keep in mind that if you want somebody, chances are really good that somebody else wants them too. As a senior search consultant with CLA, we're seeing this day in and day out, top talent is hard to find, and they're hard to secure.

Jon Fagan:

So make sure that in your process, you're coming up with creative touchpoints to make sure that the candidate experience is something that will be memorable. So recruitment starts with attracting candidates. I think most of us would agree with that, right? We do see that quite a bit in the life cycle, right? And we're hearing a lot about work-life balance in hybrid work arrangements. I'd like to throw out a small disclaimer here before we tackle this slide. We are all in healthcare and there are distinct differences between clinical and non-clinical staff. I recognize that and recognize that several of these talking points that you may hear today may not be applied or achievable when dealing with our amazing clinical professionals, but these are key areas that encompass both clinical and nonclinical professionals. So it's not all about the money, candidates are looking for the total package, where can you make it up? Non monetary rewards are everything. Compensation is just part of that equation. What can you do better?

Jon Fagan:

We've seen several of our clients look at their offerings under a microscope recently, and many have found that there are so many things that you as an organization can do that cost little to nothing financially, but the return on investment on impact directly correlates with retention and recruitment. When you're explaining an offer, for example, to a candidate, have that open conversation, what is the total package? Sit down and go over by including what the benefit costs that your company will incur. Explain merit increased processes, if available, costs of living adjustments, if available and bonus structure, if available. By doing this, you're over communicating with the client that it's not just all about the monetary value of their quote, unquote, "base salary." So spend time to do that. I can ensure you that by doing that, you'll also help build and continue to build that relationship with candidates throughout their life cycle.

Jon Fagan:

So during today's call, we'd love for you to think about what is your competitive advantage specifically when you have budget constraints. We get it, we all have them. Also keeping in mind the internal equity considerations when hiring a new staff, please think what does your onboarding program look like? Is the process effective? And does it promote inclusivity? Is there work-life balance? Do you have the capability to offer your back office potential hybrid work from home days so that they can continue to be who they are outside of work and in their homes? What's your culture, what's your identity? We could spend hours talking about all of your organization specific cultures and identities. What are you

proud about? Make sure you're talking to candidates. We've all heard the term climbing the corporate ladder, but not every organization has the ability to have that corporate ladder.

Jon Fagan:

So on the flip side, work with candidates to understand what a responsibility or growth ladder looks like, help them understand what their life cycle will look like in their role and what the career path looks like. By doing this, you can incorporate innovative technology solutions. Do you have technology at your fingertips? Most of us do today. Brag about them. Professional development and academic development is also another key area where you can upsell your organization within the selection process. The biggest hot topic item in today's climate has been around wellness and being that we're all in healthcare, wellness should be extremely important to us. Are you offering any type of specific or special wellness programs to your people? This is another opportunity to tug at the [inaudible 00:08:19] get them to engage with your culture, get them to open up, learn more, another critical touchpoint within the selection process.

Jon Fagan:

So as we move on to how to attract and retain talent, here are just some ideas. Develop and promote a culture that is uncompromising in encouraging and rewarding desired behaviors. Consider implementing performance-based variable pay compensation models that reward staff for overperformance against challenging goals. Can you develop and promote position specific career roadmaps that staff can use to plan their careers at your company? Consider implementing organization-wide, equity-based compensation programs to share the value of your staff and what they've contributed and how they've grown.

Jon Fagan:

Develop clinical leadership teams. This is a great way to combine your clinical and nonclinical teams. This will help require their input on organization decisions to better align the key stakeholders within your company. Ask yourself, do we have the clinical resources to expand into new markets? How can we proactively and collaboratively manage medical supply and lab costs? Huge question. And lastly, can clinical performance be incorporated into compensation. So we're going to launch a poll here as to what to listen for and would love to receive your feedback as what you're hearing, if you're a decision maker involved in the hiring process, we'll get that out right now.

Jon Fagan:

Wonderful. And while these results are coming in, I would love for the audience to just take a minute here, just a quick self-assessment and then I'll highlight some of the key takeaways. Love everybody to just grab a scrap piece of paper and a pen, draw a line down the middle of that page. In the left column, please jot down the two or three things that you think that your organization is doing a really good job with. In the other column, please jot down two to three that you'd love to see either yourself or your organization, either invest in, explore in or do better. And when you have time in your next team or leadership meeting, feel free to bring these topics up. They could be great talking points to guide the conversation as to what could be done better to enhance collaboration within your teams. So, as I'm looking here, work-life balance is in a commanding first place with benefits, better commute, and a positive culture stacking up in the two, three and four ranking.

Jon Fagan:

Appreciate everyone's participation in that. As we move on to retention and spend a couple more minutes with you talking about some best practices and how to keep your most important resources. So rewards and recognition, what can you do to booster recognition? Do you know members of the team, do you know how they like to be recognized? Just like people have a learning style, people have a recognition style. A huge email to the company may work for, but not all. Some of my peers just like a pat on the back. There's referral programs. What are you doing for your people? How do you turn your entire workforce into a recruiting workforce? Where I come from, recruiting is everyone's job. Recognition programs, in the last several years, we've seen recognition programs decrease and employees would love to have them come back. What do you do for those hitting major milestones within your organization?

Jon Fagan:

People remember those gifts and they appreciate them. Want to spend a minute here talking about some of the most critical things that you can be doing with the resources that you already have within your organization. And those are in the form of stay interviews and exit interviews. These are critical. Stay interviews allow you to get real with those who you can't afford to lose, understand what keeps them there, understand what keeps them motivated and what can be better. Take that feedback and implement it into using that to have your team members feel the value, feel that their voice is being heard. Exit interviews, also super critical. You just lost a great employee. The reality is starting to set in, but how can you use their departure as a tool to keep others, use it as an advantage, sit down before they depart, get real with them, understand what motivated them to leave.

Jon Fagan:

You can use this intel to strategically protect others in the department or organization [inaudible 00:13:28] learning and development has become more and more critical. Find ways to invest into growing your workforce and your people by supporting them, help them learn new things. You don't have to go out and pay for their entire MBA, but are their credentials, online certificates, things that you can invest in them so that they know that they are being invested in. Most employees have no idea what their career path looks, sit down and help create that model. So people know where they can go today, tomorrow, next year, and beyond, and always promote health and wellness. Again, it is one of the biggest things employees want to date. Thank you so much for your time. And I'm excited to kick things over to my colleague, Trevor Smith.

Trevor Smith:

Thank you, Jon. That was great. I'm going to spend some time speaking about hybrid workforce and technologies. And I think what we've all found is that over the past several years, the pandemic has forced companies to be a bit more nimble and flexible as it relates to leveraging technology in order to better serve our workforces. So some key trends that have arisen over the last year or so. So as Jon stated earlier, employees now have a worth it equation. So as we see relatively low unemployment, rising inflation, employees are being squeezed as it relates to compensation. So how are we able to make the work experience at our companies worth it for our employees? Some of the trends that I've seen in healthcare that have been successful are looking at variable compensation, whether that's signing bonuses, performance based bonuses, retention bonuses. The key here is to try to make any adjustments to compensation as variable as possible.

Trevor Smith:

So you're able to keep your fixed cost relatively low. Secondly, managers feel wedged in between leadership and employee expectations. What we found here is a real need for professional training, as it relates to managing expectations, both upward and downward for managers. Being a manager in this environment is very difficult, so the more that we can invest in our employees in terms of formalized training to deal with these expectations, that the better off our companies will be. Also, leaders need to make the commute to the office worth it. So creating an environment and a culture that is attractive, accessible, and transparent is also very important.

Trevor Smith:

We've also found that oftentimes our employees are treating flexible work as meaning, they need to always be on. As leaders, we need to decouple the belief that being flexible or working remotely means that employees always have to be on our accessible. It's okay to take a break from your screen and go get lunch, if you're working remotely. Encourage your employees to take a break and take a walk in the morning or afternoon or both in order to get some time away from the screen to refresh and recharge. And lastly, building social capital in a hybrid world looks different. So we have to be intentional and deliberate about making sure that we are able to build a culture that's attractive to our employees.

Trevor Smith:

So my next topic is outsourcing and fractional considerations. And at CLA, I am a CFO consultant. So I'm going to speak to these considerations through the lens of a CFO, but you'll find that many of these observations are applicable to functions throughout your organization. So some of the pros of having fractional employees. One, you're no longer responsible for staffing. So whether it's recruitment, retention, that's handled by outsource partner. Secondly, a second pro is that you're able to add efficiencies day one. So in working with an outsource partner like CLA, you'll find that we have a stable of professionals who will have a minimal learning curve when joining your organization. So you have an experienced employee or an experienced resource day one. A third important consideration is that you pay for what you use. So whether it's a need to ramp up your outsource usage during an audit or the budgeting process, you're also able to ramp down that usage as you have fewer immediate needs for that outsource resource.

Trevor Smith:

And then lastly, as I mentioned earlier, you have the technical expertise and industry knowledge day one, when dealing with an outsource partner. Some of the cons, availability, typically your outsource resource is not on site every day. There's flexibility in terms of working with your outsource partner to determine how many days you would like a person to be on site, but it's typically not every day. And because of that, moving to the second point, you have to make sure that you have the resources and platforms, especially from an IT perspective that allow the appropriate amount of access to your outsourced resource or your fractional resource. And then lastly, because you are working with an outsource firm, you typically aren't able to pick your staff or your team. But again, in working with firms like CLA, we have many industry professionals that we can provide to you for your outsourcing fractional needs.

Trevor Smith:

And typically when we work with our clients using our fractional resources, they fall into one of these three buckets. And starting with the bucket on the left hand side, these are usually firms that are in the sub $5 million revenue range. So accounting is not their strength. They may have a bookkeeper or a

small accounting staff, but for whatever reason, they aren't able to produce financial statements on a consistent and timely basis. And there is limited oversight of the cash flow process. So we have resources that allow you to outsource these functions and again, ramp up or ramp down the need for these resources on an as needed basis. The second group in the middle typically falls within the 5 to 15 to $20 million revenue range. So these are companies that have been successful. They have a track record, but they're still relatively small in the big scheme of things. They're fast growing and oftentimes need help with their infrastructure.

Trevor Smith:

So they may be in the process of developing a repeatable and sustainable close process, but they're also too small to justify the oftentimes six figure commitment of hiring a full time CFO or controller. These are excellent candidates for outsourced or fractional controller or CFO services. And then lastly, we have the group that is, again, typically in the $20 million plus revenue range. These are established and successful businesses, but the owner is looking, the owner or other key decision makers, whether it's the board or an investor group are looking for thought partners to think about go forward opportunities. So these are things like [inaudible 00:21:42] decisions, as it relates to de novos and acquisitions. This may be close or consolidation decisions on a underperforming practice. And oftentimes these folks are looking for thought partnership, as it relates to exploring exit opportunities or succession planning in the next 10 to, I'm sorry, 5 to 10 years.

Trevor Smith:

So this begs the question where can you implement fractional resources or outsourcing to help with these issues. And the answer to that is everywhere. So whether it's in terms of execution, we can help with technology and software selection, account reconciliations, payroll processing, it runs the full gamut. We can also help with higher level analysis. So the development of weekly dashboards, process improvements, inventory management, items that can help the business function more efficiently on a day-to-day basis. And then lastly thinking about growth. So again, being that thought partner to help the board, the investor group, the C-suite executives, think about the company and where it needs to be in the next 5 to 10 years and how do we work along the roadmap to get there? And with that, I will hand it over to Matt, who is going to speak about our digital resources.

Matt Anderson:

Thanks, Trevor, and welcome audience. I really appreciate your time today. And it's an honor and privilege to join you. We've heard about the foundation of an organizational culture from Jon, attracting talent, retaining talent. We heard Trevor just now talk about hybrid trends and alternative models. Let's shift gears a little bit and talk about something near and dear to my heart and that's digital. Every one of your organizations is on a digital journey. So where are you on that journey? We're going to hit you with a poll that we're going to get into a little bit deeper, but think about this. How many of you feel your organization has adopted new software? And when you think about software, I want you to think about beyond things like Excel. We're not talking about a new macro or a new pivot table or something of that sort. We're talking about something legit that is really making an impact.

Matt Anderson:

It looks like the overwhelming majority have within the last two years adopted some new software technology to add efficiencies. That's great to see. Looks like we've got about 73% right now with a yes, so that's great. You're on the right path. So when we talk digital, is that really just all about technology

or is it deeper than that? I would argue that it's much deeper than that. It is something beyond technology, but we're going to talk about a few ways that technology can impact it, but really it starts with strategy. So when you think about where your organization is on that digital journey, think about this question. Do you know your organization's digital strategy?

Matt Anderson:

If you have one, do you know where you are on that digital journey with alignment with that strategy? Is there a mechanism to even see how you're making progress with that digital strategy? Going a layer deeper, do you have a data strategy? What data do you have? Where does it live? Is it siloed? Is it accessible? These are all things that you can think about and they all do tie to workforce and efficiency. So let's talk about some of these technology solutions that can impact efficiency. So we've got a list here of ERPs and a list of spend management applications that are just idea triggers for you, perhaps some of the CLA supports, but think about them from the perspective of what's the impact that they're having on you and what does your organization currently have? Do you have some homegrown system?

Matt Anderson:

Do you have something that's robust? These are all off the shelf. These are things that are built to add efficiency, built to incorporate workflow processes that can be automated, built to include ties to business intelligence solutions that can accommodate full transparency and interactivity with the data. So think about where you are and do you have the right size, fit, scalability, adaptability to the technology solutions that you have within your organization? Sometimes a new ERP can be an answer, sometimes just optimizing your existing ERP is the issue. Maybe it was implemented quickly, ad hoc. Maybe you ran out of time, maybe ran out of money, maybe both. So maybe there are some features, some benefits, things that could be enhanced simply by an upgrade or with some consulting help, some additional levers or tweaks to the existing software to make it more efficient, more effective.

Matt Anderson:

Maybe there's an opportunity to do something custom, however. So let's get into that a little bit. We recognize that off the shelf software doesn't always meet every need, doesn't meet every fact pattern. So when you think about your organization's business processes and how they fit with your strategy, fit with the software components, fit with the data, fit with the governance aspect of it, who needs access to what, when and how. Think about whether or not a custom solution might be a fit. There are platforms like Microsoft's Power Platform for example, or an Nintex from a workflow perspective, that are so nimble, so versatile, that within a day, you can configure something that has an immediate impact with the organization. And we'll get into some examples of that from a dashboarding perspective in a minute. You can go into greater depth with advanced solutions. So what do I mean by that?

Matt Anderson:

You start with assessing the lay of the land. What data do you have, where does it live? Who has access to it? And how does that tie to the vision, the goals, the needs of different user groups. You're going to have leadership that wants to see and view one thing you might have people within, I'll call it the operation of the organization. So this could be physician providers, for example, in a physician practice. Now maybe they wear both hats, maybe they're the owner and they're a provider. And so they want to see everything. But then what about the office admin? What about mid-levels? Do they need to see everything? Maybe, maybe not. So thinking about that governance aspect of your information and the

insights coming from your information and how do you manage that? Perhaps there's a need for something deeper that gets into infrastructure.

Matt Anderson:

So sometimes it's easy to just take a piece of software and connect it to one of your source data systems, say your ERP system. That might work, but that also might present some challenges, because it could bog down the system when you're running reports off of it. It could provide some good insight, but be inefficient in how it does that. It could also be exposing a vulnerability if you're connecting directly to an ERP platform versus an alternative environment where you might create, say a cloud data model, a cloud data warehouse, someplace where you can bring data in from a variety of sources, transform it along the way. Maybe you call some of the things out that you don't necessarily need, that aren't critical. Maybe you need to take some things and transform them in the process, convert them into something that's more meaningful. Maybe you need to actually combine data from multiple data sources together to really drive impact, to really make that insight actionable for the organization.

Matt Anderson:

So those are the more advanced things that we can get into with data warehousing that also gives you governance layer, where you can have full transparency and insight into what that information is, limit permissions as needed to that information to different user groups or individuals along the way. So let's look at a couple of specific examples related to healthcare and the effectiveness of meaningful dashboards and how they might impact efficiency. Let's start with dental. So a dental support organization often has multiple locations that could range from really thousands of clinics to tens or hundreds of clinics. Think about that from a data perspective and how do those DSOs come to be typically by acquisition? And even if they're on the same platform, say they're all on Dentrix. Well, what is that? Is that Dentrix Enterprise? Is it Dentrix Ascend? What version of those software do each clinic, each location run.

Matt Anderson:

These are challenges that are presented to us all the time within our client base. So in this particular example, multiple clinic locations using multiple different practice management systems, different versions of the same system, how do you get transparency across that information that is siloed, it's in different places. Sometimes there's no IT infrastructure at all. IT is whoever's the sharpest person in the room, right, that maybe is a wiz from some other background, some other life, right? But they're not actually serving a fully functional IT role. Maybe it's an outsource provider that started with one practice and then you keep layering on and they keep taking on additional tasks and they're spread thin. We've seen all kinds of different scenarios in the IT space within DSOs. The bottom line is they can be a real challenge. And how do you get good insight, good information altogether in one place. Now there are platforms out there for this. There are platforms that out of the box will give you fully functional information, but do they appropriately bring all the insight that's actionable to your fingertips or do they just give you everything?

Matt Anderson:

We've seen paralysis of analysis take over when people are using systems that just have too much on the screen and we get leaders and providers that ask, "you know what, I just want to know how we did yesterday? I don't need to see every facet of my organization sliced and diced a hundred different ways. I don't need to see all the details, but tell me how I did yesterday." That's the kind of insight that we're

talking about. So this kind of a solution is possible using API technology, that's application programming interface technology to go and access data directly from a system. Now that could be a cloud based system. It could be a system that's sitting on a server in a closet within the office. Either way, as long as you've got network connectivity, you can leverage API technology and connect to that data and pull it down on a daily basis.

Matt Anderson:

So this is a solution where operating data coming out of multiple practice management systems can be pulled together into a data warehouse where some of that data is transformed. So think about what are the facets of this operating data? Well, you've got production data. That's your patient activity down to the individual patient encounter that gets billed. Then you've got accounts receivable detail. So that's going to age, hopefully not too long, but that's going to age over some time, then eventually it's going to get collected. So what does that collection activity look like? When you pull those things together and then you want to think about it along different verticals by office, by specialty [inaudible 00:35:19] hygiene activity versus surgery activity versus pediatric versus orthopedic or, sorry, orthodonture. What are the different specialties within the organization? And then all the way down to the provider level, what is an individual provider's productivity looking like? That could be isolated to a given location, or it could be across multiple locations.

Matt Anderson:

So having full transparency of this information can be enabled by technology today through dashboards. So one that we find is effective is Microsoft Power BI. We also support other similar business intelligence platforms, but what's the end result. In this platform, we're connecting all those details that I mentioned from an operating perspective, but what about the financial? That financial data is going to live somewhere else. So a lot of those systems that are out there that connect to various practice management systems may or may not connect to various financial reporting systems. So here we have a solution that's enabled that brings all of that together, regardless of its origin. So you've got operating data mixed together with financial data. That's true transparency, that's true insight. So you can take action on that information, that's at your fingertips 24/7 and it requires no effort to maintain.

Matt Anderson:

So think about your practices today. What happens every month? Any of you have a process that involves an Excel file, starts maybe with somebody downloading a report, maybe they need to connect that data to something else. So they grab another report and they'll copy and paste that into another sheet. Then they'll connect the dots between the two of those with a VLOOKUP formula. Then maybe they'll turn that into more actionable intelligence. And they'll turn that into a pivot table that summarizes group's information. Then they'll maybe pass that on to someone else who gets information out of that and maybe adds to it and so on and so forth. We see this process over and over again within our client base. The effort that it takes to maintain those processes is tremendous, not to mention the risk exposure to human error, to flaws and incompleteness, inaccuracies in the data and just downright inefficiency. And more often than not, things that people are doing that they're not really super jazzed about coming to work to do every day or having to repeat every month, right?

Matt Anderson:

So technology can be your friend and it can enable these things. So what does it look like? These are some examples. I know they're not super huge for you to see, but just a couple of shots. I wanted to put

a couple on one page here, but this is that DSO with anonymized data, where you can see at a glance in the top left an overview of production, collections, your net production. So what are these insights right at a glance. And then you can actually drill through to get the details that are presented on the bottom right. So you can see key metrics that might be single value. So you can interact within these pages to isolate a given time period and get more insight.

Matt Anderson:

This is all sitting on top of granular data all the way down to the individual patient encounter right at the fingertips. This is what technology can enable, can eliminate those manual processes that take place month in, month out, week in and week out, day in, day out, whatever the pattern might be for you. Let's take a peek at another example. So here's a physician practice. Now this is one where they had grown by acquisition, multiple locations. Again, multiple systems, similar pattern to the previous one. We need to get insight. We're on a old legacy system. How can we consolidate our information by location, by provider? When the system itself is a barrier, it's a limiting factor. How do we get this information out? This problem we approached using some other technology that you might say is data science techniques, where we used the same power BI dashboard to present the information.

Matt Anderson:

But the horsepower here was how do you process data from a really messy source, a really cumbersome source. In this case, they didn't have a functional API for this platform. It didn't make financial sense for them to, at the time that we interacted with them, upgrade their ERP system. That might have been a better solution in the long run, but they weren't ready to make that leap yet. So how do you make deal with what you have? Well, data science techniques can allow you to really bring horsepower to the table in terms of ingesting data, cleaning it, processing it. In this case for every period that we were helping them present their information, we had 200 source files coming out of their systems. About 80% of that data in those files was a mess. It was unusable. It was either really poorly organized because you had multiple structures within the same file from top to bottom.

Matt Anderson:

So it wasn't actually a data file. It was a report that was printed to a text file. So it's a mess. How do you clean that up and get down to the usable information? That's what this process was that we went through and what it came down to was a simple executable script that you could run one time, one long enough code, run it each month in this case to generate that [inaudible 00:41:42] cleaning process, all the messy input and get it down to a set of reports that go into a business intelligence dashboard that's accessible 24/7. And in this case, there was actually a problem that was unsolvable with manual effort, just in time constraints alone. They could not reconcile consolidated accounts receivable manually. They spent an entire month, multiple FTEs actually, trying to figure that out and just couldn't get to it.

Matt Anderson:

Couldn't get to a number that was reconciled. We were able to do that with this automation and efficiency solution. So you have better informed decisions. You have complete transparency and insight at your fingertips. It's available to anyone. And in this case we had different user groups. So we had leadership that was interested in looking at the whole picture. They wanted to look at consolidated operations. So that's great. But what about the local office leader, that office administrator that really just cares about managing that office the best they can? What about the provider that needs to just pay attention to what they're doing? So think about that too. As you're approaching these kinds of

challenges and problems, think about the perspectives at play. You can have a leadership perspective that looks completely different from other groups that you have, and you could administer the same information through the same lens if you want.

Matt Anderson:

What I mean by that is you can build one dashboard and then limit the views or limit access to certain data elements under the hood. You can also take and create separate views, separate reports and change how you provide access to them. So that was the route that we took. In this case, we had some consolidated views that were exactly what leadership wanted, and we had a single page snapshot that any provider could go in and look and see, how am I doing? What's my productivity. In this case, we had other drug activity that was being provided to patients that impacted provider compensation. So what does that look like? How are my metrics aligning with what I'm expecting I'm producing in terms of my patient visits and my output for the last day or the last week or the last month? And what does it look like when I look at it in the system, does it align or not?

Matt Anderson:

And how does that impact my compensation, my take home. So those are the kinds of insights that we're talking about. So what does that look like here? Just a simple graphic. This is one component of that output dashboard, but we had those 200 Excel files that were coming into us. 80% of it was a mess. We were able to execute one line of script. That was an R script. In this case, we used the R language to apply those data science techniques. And then we've got a dashboard that's updated and management providers, all the user groups in interest can jump right into that information and get what they need. So I'd like you guys to just reflect on those examples and not focus so specifically on these fact patterns, but think about what are the fact patterns that apply to you, get creative.

Matt Anderson:

Think, I didn't see them talk about this today, but I wonder if technology could help solve this pain point or this problem that I'm facing every day or every week or every month, and then have a conversation about it. Explore technologies, explore consulting advice, find someone who's been there, done that, and likely you can find a path to some efficiency gain and don't lose sight of where I started. Don't lose sight of the strategy aspect of it. Sometimes we see that clients want to just jump right into a solution, but they don't really have the strategy formed. They don't have a clear or even uniform consensus from the leadership team or ownership team direction for where they're going. So make sure that the foundation of strategy is there before you go to solutioning. So I will wrap up with that parting thought. We will now, I think, I'll come to you as a panel and address any questions that you might want to lob our away.

Ron Kain:

Absolutely. There's a question and I think this is from the audience. I think there may be more than one of you that would like to chime in on it, but I believe Trevor, you spoke about employees or even potential candidates for employment feeling wedged between leadership as well as employee expectations. And one of the questions for the audience is, are there specific trainings that you would recommend to target these types of skills [inaudible 00:47:09] I guess from perspective of developing, the question actually [inaudible 00:47:13] about training leaders of people to hone the skills of navigating the expectations of leadership, as well as the employee expectations. So are there specific trainings or specific skill sets that any of you feel, should be looked at from that perspective?

Trevor Smith:

Yeah, I'll take a first shot at that, Ron. Thank you. That's a great question. I don't have a specific training program to recommend or point anyone to. What I found most effective is to integrate the HR department team into this process. One of the key points that Jon brought up during his portion of the webinar is making sure that we've developed a career path for our employees, whether it's a clinical or nonclinical career path. And what I found most efficient is leveraging HR to help formalize those training programs. What we don't want to do is have a bunch of one offs when everyone is doing their own things, so to speak as relates to these trainings. So we want to have some consistency and efficiency around that process. So what I've seen be most effective is for me to refer an employee who may be looking for that type of training to HR and working with HR to determine a program that is effective for the employee and also repeatable and scalable for the rest of the organization, because other folks are dealing with the same issue within their departments.

Ron Kain:

Great. Thanks Trevor. Does anyone else have anything they'd like to add to that?

Jon Fagan:

Ron, I'll jump in real quick on that topic as, as well, Trevor great points there. In the modern day of technology, there are several resources available. I know a lot of members on my team will refer to the LinkedIn Learnings, they've becoming increasingly popular. Well, I appreciate that question. I don't necessarily know if LinkedIn Learning has the exact training on that. I think that is very specific, but LinkedIn Learning would be a great place to start. There are also a bunch of other eLearning curriculums that may have those types of leadership topic trainings. That's a great place to start. I know internally we've got a human resources consulting team that does executive leadership. In fact, I've got a gentleman on my team that, pretty much all he does is leadership. He travels around the country working with different leadership, organizations and staff members to really help understand different learning styles, different coaching styles. So there are absolutely resources and I'd be happy to even do a little bit more research here and get back to the individual that has asked the question.

Matt Anderson:

Yeah. I'd like to add to that too. Great comments. Think about a learning plan and what does that look like maybe for different roles within the organization. So curate some of that content and assemble it in a plan, maybe that gives those up and coming leaders something to advance through as they progress and advance through their career. You can't fast forward experience, right? But you can fast forward learning. So how do you give them something that's tangible and achievable with milestones and don't underestimate the impact and value and importance of emotional intelligence, things like having caring conversations and really being able to interact with teams with empathy and walking in someone else's shoes, listening with their ears and seeing with their eyes.

Ron Kain:

Thanks, Matt. I appreciate the additional context on that. We do have another one that came through, and this is a question that you see probably quite a bit, and that is how can we attract new resources without raising salaries. So who wants to give that one a shot?

Jon Fagan:

I'll jump in on that one, Ron, because it is the million dollar question. I'm pretty much asked that question every single day and have been for quite some time. So I think it goes back to my piece in the presentation talking about those non-monetary rewards. It would be critical to work with your HR department, your people solutions department, whoever you have internally that is taking a closer look at total rewards on an annual basis, looking at the benefits and where does it cost that little to no money to potentially increase some of those rewards? Well, we look at internal equity. A lot of our clients are not in a position to be able to raise salaries, but where they can make it up are in areas of paid time off, personal time, sick time.

Jon Fagan:

Obviously you have to do that across the board, but when we're negotiating new candidates to start with employers, oftentimes the dollar amount isn't raised, but an additional three to five PTO days are raised. And when you throw that into that total rewards equation, you can put a financial figure on that, right? Those are additional paid days off. Looking at your benefits plan and working with your benefits broker on a very regular basis is critical. These are professionals that are creatively customizing plans for organizations like yourself on a very regular basis. They've figured out ways to keep the salaries level set, but increase in other areas. So partnering with your benefits broker is also a great starting point. Those are just a couple of tips to name a few.

Trevor Smith:

Yeah. And I'll just add to that, Jon, what, what I've seen be very effective is being very intentional and deliberate about mapping out a career path. So making a career path that's customizable to your employee and making sure you have a good understanding of what the employee hopes to achieve during their time at your company. You can have two employees in the exact same position today, but have very different thoughts on where they like to be in the next three years to five years to seven years. And making sure you're aware of those differences and can share in a transparent manner a career path that is satisfactory to both of those employees that gets them excited, is something I've seen be very effective as it relates to recruiting as well as retention.

Matt Anderson:

Great comments guys, I'll add in one more thing too, and that's around coaching. So I think all these things we're talking about, speak to culture, and that's where Jon started that foundation of your organizational culture. A key component of that is coaching. Do you even have a coaching process, a coaching program, coaching structure within your organization as part of your culture, if not, take a hard look at that. And we've found in our own data that coaching plays a significant part in retention of our people. And that's just the participation in a coaching program, let alone the quality, the consistency, the depth to which those coaching relationships develop. So we've built and put a lot of effort into training programs, making sure that we're training our coaches to be effective coaches with consistency, giving them an appropriate playbook to how do you build those relationships effectively and then make sure that they rotate from time to time.

Matt Anderson:

So you get the benefit of interacting with others. Now sometimes with a smaller organization that might be limited, but where you have the ability to rotate and have those relationships evolve and spread across multiple people, multiple touch points. You'll just see that culture continue to grow. And if you've got that solid foundation of organizational culture, and then you have the ability to present that to

candidates as an attractant, then I think the salary, it doesn't come completely off the table, but look, any one of us could go out and get more money, but do we really feel inspired and enjoy the people we're working with and feel supported, feel like someone cares about us in our role and on our inspired career journey. That's really the cultural piece that's going to bring everybody in and not get down to pension pennies.

Ron Kain:

That's great information, Matt. I think, I'll kind of wrap it up, but my takeaway after listening to the three of you, is that you've got to get creative in today's environment. Talent is limited and you have to sit down and look at it through a little bit different lens than we maybe have done in the past. All that being said is, if we do have someone who's interested in looking a little further on some of these solutions, whether it be outsourcing, whether it be digital, whether it actually be talent search and your recruitment from our side, what's the steps that those people would take to engage us or to at least have a conversation about those things?

Matt Anderson:

I'll start from a digital perspective, it's easy, just reach out and we'll connect with you. We'll try to figure out where you are on that digital journey and you don't have to worry about trying to figure out what's the ideal solution. Just be curious, just ask some questions. We'll come alongside and help figure out where you are on that journey and what's the next step.

Trevor Smith:

Yeah. And on the outsource fractional side, Ron, anyone can feel free to reach out to me. We have resources from staff accountants all the way up to fractional CFOs. So if there's a need and it's something that you'd like to explore, feel free to give me a call or send me an email.

Ron Kain:

Perfect.

Jon Fagan:

Thanks for asking, Ron. Same goes with us, the team that I represent and support, we do professional level searches, executive level searches, human resources consulting, professional leadership coaching, as well as payroll and HRIS support as well. So happy to receive an email from anyone or a phone call, and I can promise you that I will help you reach your final destination.

Ron Kain:

Great. Well, I appreciate everybody's input and I think we are at time. So once again, I'd like to thank everybody for joining us, taking some time out of your day to spend with us as we discussed this ever important topic that everybody is dealing with on a regular basis. So with that, I believe we'll wrap it up and hope everybody has a good remainder of their day. And once again, thanks for joining us.

Matt Anderson:

Thanks everyone.

Jon Fagan:

Thanks everyone.

Trevor Smith:

Thank you.

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