

## Health Information Compliance Alert

### Practice Management: Harness Office Data to Promote a More Cohesive Work Culture

#### Don't forget about patient engagement, too.

As COVID numbers start to trend upwards with the Delta variant in many states, your staff may be feeling burnt out and disconnected from work after a year in the pandemic trenches.

Revitalizing your space and work culture with a high-accountability workload system may be the key for getting everyone on track, said **Adrienne Lloyd, MHA, FACHE**, founder and CEO of Optimize Healthcare and MGMA consultant, in a presentation at AAPC's 2021 HEALTHCON in Dallas.



#### Identify Patient, Employee Wants

A medical practice obviously involves and necessitates providing services to patients, and employees to provide those services. As a manager, you need to figure out how to meet obligations and satisfy whatever "wants" you can, in order to provide good customer service and also keep employees happy and therefore productive.

For example, patients want "what they need and want, in the place they want, with the provider they want, at the exact time they want," Lloyd said. And practices hope to meet these expectations using as few resources - people, equipment, space, materials - as possible, she added.

Physicians want their patients to be satisfied with the services they're provided, for staff to perform their duties consistently and timely, and to have a team they can rely on for support. Staff want to understand their manager's expectations, know how they and their colleagues can be accountable, and to have consistency in their workplace and autonomy where possible, Lloyd noted.

The best way to meet this balance is to design and implement a process that consistently sets expectations and delivers results - while watching out for burnout.



#### Rely on Analysis

Don't bank on just your gut or a feeling - look at numbers to see where you can focus improvement. Break down your clinical work processes to their base components: scheduling to check-in, pre-provider work, provider services, follow-up services, check-out. Look at the processes inherent to each of these and then calculate the time needed for each role and task, she said.

Now, you can make observations on the time and start analysis. Break down everything into its minutest element and make a spreadsheet with each identified aspect, and then start tracking. Next, you can identify the lowest repeatable times, and start building your expectations for processes around those going forward, she recommended.

Don't forget these key points of data analysis, according to Lloyd:

- Go for consistent data collection note variation on flow from day to day or with particular providers;
- Make sure your sample size is large enough to give accurate results;

- Aim to get additional sample pools if you have a wide variety of results; and
- Base your analysis on median and most frequent time instead of averages.

Having data is really useful in facilitating conversations about performance. If you have the data to show that some people have lower productivity, you can have a conversation that includes the data. This can help you define lower performance and then figure out whether you can provide a fix by offering additional training or if the person just doesn't want to perform the tasks at the rate you're expecting.

Use your analysis productively. For example, setting metrics for productivity won't make sense for every role. This is also a good time to figure out which skills are necessarily inherent in a team member versus those that can be gained through training, she said. Apply the metrics consistently to avoid conflicts, she emphasized.

You can also use the data you've gleaned to pinpoint waste. Where are staff wasting time, whether intentionally or because the processes, as they stand, demand it? Would formally scheduled "downtime" boost everyone's happiness and eliminate the low productivity moments in a day?

### **Amp Up Engagement - Consistently**

Beyond analyzing numbers to figure out who's productive, where to trim "waste" time and add resources, it's important to be clear on how you communicate your vision and direction, she offered. But remember to aim toward balanced leadership that is focused on both results and people.

"It's really key that you have support and consistency from your leaders, your managers, your supervisors," she said. You want to make sure all of those leaders are presenting a united front on these measures, because if they don't, staff will notice the inconsistency, which may cause strife. Having standard and repeatable practices and operating guidelines - in alignment with your organization's vision, values, and beliefs - is the foundation for true teamwork, she said.

**But don't forget:** You're aiming to improve productivity, which you're measuring quantitatively, but you can't forsake quality. You may need a counterbalance measure, she cautioned.

### **Make Data-Based Personnel Decisions**

Once you have your numbers, you can nurture your high performers, Lloyd said. Provide opportunities to lead changes, look for initiative and positivity - within the bigger picture of the organization, and offer additional training or support when you can, she said.

You can also help put low performers on a path to goal meeting via a performance improvement plan. With numbers in hand, you can detail applications in performance and set an expected timeline for improvement, Lloyd explained. Maintain accountability by following up at regular intervals, and know that you may need to reassign an employee to a different role that is a better fit or even terminate the employee to hire someone who fits.

Data is your key tool for illustrating performance, so use it as you make and justify your personnel decisions. Often, you can hire staff who are aligned with your new vision and are stronger performers than those you let go, Lloyd advised.