



Building A Digital Transformation Roadmap – Aligning Technology, Team, & Processes For Superior Consumer Experience & Engagement: The 2023 *OPEN MINDS* Seminar

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Speaker 1 [0:00]

I don't know about you about being a part of a seminar in a theater setting. It's very interesting. I like it's exciting. I'm Carol Clayton. I'm a senior associate with open minds. And I'm joined with Paul duck today, Paul is our Chief Strategy Officer at open minds, we really welcome you to our institute this week, and certainly to this seminar. Our seminar today is going to be about building a digital transformation roadmap. And we're going to be talking about really how do you align your technology, your people and your processes for really using technology to leverage and create consumer engagement, consumer experience, because at the end of the day, that is what you all are about. And that is how you will sustain your businesses. So how can you really harness the power and innovation of technology and incorporate that with your people and processes? I want to thank qualified tax qualified tax is the sponsor of this seminar. Any folks from qualified tax here in the room out there out in the hall? Well, look, not only do we want to thank them, please, for sponsoring this engaging seminar. But most importantly, as important, maybe around three or 330, we will have a break. So think of it as your intermission at your movie time. And we will have snacks if you go out and go past sort of how you came in, there'll be some brownies, cookies, and also raffle tickets. So don't forget to get your raffle because at the end of the seminar, qualified X is giving away a valuable prize. So be sure we'll we'll break about three or 330. And we'll have that opportunity. So if you're feeling restless, or feeling like a little droopy by then they'll give you a chance to move around, get a snack, come back in. And we'll be able to hear from qualified acts as our sponsor, and then finish up our session. So welcome again today, a few housekeeping slides, or comments here. If you need any help, there are lots of staff with open minds here they have orange badges on so if you need direction assistance in any way, always remember that our presentations are recorded. And so in a few days out on the open minds website, you can download the PowerPoint, you can download the recording. So for any of you who are here that you want to either remind yourself or you want to pass it out to other team members who could not join you today, please take advantage. They are available for 30 days after the event. We'd love for you to as we're talking about technology, please post out on LinkedIn and other social media Twitter at open mind circle, use the hashtag open mind leadership, let people know you're here. Let people know about your experience. We'd like to encourage awareness for

not only your your your in your participation, but for ourselves as well. We do have a networking reception tonight at Bob's. So please join us we'll have drinks, we'll have some light bites and streamline health care is our sponsor of the reception. So be sure and give them a shout out as well, we could not be here without all of our sponsors for this event, and so we appreciate all of our vendor partners and our sponsorships. We do have QR codes at the end of each presentation so that if you are interested in learning more, this is also a new way for us to be using technology. You can use that QR code to contact our consulting team and do any follow up. So you know, we're the kind of organization that likes to walk our talk. So as we're trying to help you advance your digital roadmap, we are certainly advancing ours as well. And that's, I think, the kickoff for where we are today. So what are we here about, as we said, we're really wanting to talk about how you can leverage technology, bring that into your workflows into your people processes. And the key I think here, and I hope you hear this in the theme throughout, is we're talking about something more than an add on. You know, there are certainly solutions that you do add on, whether it's a patient engagement solution or appointment scheduling online, but we really want you to get up and think a bit more strategically about how you bring technology interfaces together. And actually think about a roadmap about where what do you do first, second, third, fourth, and build out over the multi year period. And so we hope that you will hear those themes throughout our session today. Here are our main objectives, if you will, what does it mean to be Digital First, we you know, we love to throw wet round terms, but when you get down to it, what do they really mean? How do you think about technology as a part of your business track? Adeje not something that's just an adjunct of or a call center. But how can you use it to leverage your overall business strategy, we will look at technology technology through a quality lens. And how you think about using technology to improve your quality. And really look at the competencies you need in your organization. As you all know, technology can be really shiny object fun, but how do you actually bring it in? Incorporate it get engagement and what kind of skill sets do you need to have internally to do so. So that's what we have for today. Let's talk a little bit about digital bursts. But let me kind of get a feel of the audience here. We've got folks from assuming all over how many people are in driving distance to get here. Pretty good number I drove myself I live in North Carolina, it's you know, it's always for me, it's a balance of is it faster to drive or to fly and I have decided it's faster to drive so I don't get stuck in the airport. And it regardless of which airport offline to I still have to drive to get to Gettysburg, so I just decided to haul it on up the mountain and come over. So who's left? I want to see who flew who flew from the West Coast. Anybody from California, Alaska, Hawaii. A shout out to that West Coast group. Thanks for coming all the way over to the being a part of today. We really appreciate you being here. Interested in what brought you to this particular seminar? What are you hoping to get out of it? Key takeaways, Paul, and I want to make sure that we are on point with your knees. If you had one thing that you hoped you went out with somebody share with us for a few minutes here. What do you hope you get out of today's session? Besides cookies and brown? And

Speaker 2 [6:49]

remember, we have this is being recorded? So it will be important to wait for the microphone? Oh, well, we did that. With your luck. There'll be somebody in the last row.

Speaker 1 [6:58]

We have someone, someone here and here. We'll just grab these folks. He was the first. Yep. And then you can come down to the next row below and then we'll move on.

Speaker 3 [7:07]

Since my question is focusing on how risk averse the healthcare market is? How can you build strategies to sort of use digital quickly, rather than sort of taking its time as the previous presenter said, you know, a government speed. And so therefore, how do we do that? Because the Amazons, and people like that are moving really fast? Right?

Speaker 1 [7:31]

That's a great question. We'll make sure we address that. And I will also give another point. Stuart Bucha lair and I are presenting on culture and change. I think tomorrow, Stuart, you're in the audience somewhere. But we'll also be talking about sort of, I think what I'm hearing you is how do you implement things. And it almost fail fast. If you need to fail fast, so that you can iterate and reduce your risk. And that will also be a part of that session. So you might want to check that out if the same for the rest of the week. Woman in the middle? And in here, no, go ahead. We'll work right here. And then we'll move on, you can just pass it to the right.

Speaker 4 [8:08]

Oh, sure. Okay, is the CEO, I just don't have a great IT team. But you know, I don't know a lot about this. And I want to make sure I have a little bit better knowledge so we can assess and because it will be a lot of money in the future. So I want to make sure we're going in the right direction.

Speaker 1 [8:21]

I love that comment. Thank you. Because I know many of you are coming from leadership positions CEO or other C suite. And having been in your situation, I'm a psychologist by training, but I ended up running a technology solution company, and, and so on, truly being able to converse with very skilled developers and IT team and a level of sophistication that was certainly beyond my experience was always a little anxiety producing for me, and I wanted to learn as much as I could. Last comment, I think we're seeing innovation and embracing of innovation in healthcare more than ever before. And it's the AI movement, and everything is moving faster than ever. So I'm seeing so many new applications and vendors. And even even once you implement a new EHR, many of them can use API's to plug in and do new things. And so I think the challenge for me is knowing where that line is, because there's of course, a price tag that comes with every one of them. And they some of them do fantastic things or purport to so knowing exactly how to assess each of those. And I love the idea of failing fast because sometimes that's the way you got to do you got to jump in thinking it's going to do something but know quickly when it's is or isn't going to going to work. But I think figuring out a way to balance the budget and which of those to grab onto. Yeah, exactly. What do you do for Yeah, thank you. Well, thanks for sharing really appreciate that. Let's talk a little bit um, Moving on, what does it mean to be digital first mindset? I like this reframe because it, it's really as a leader, it compels you to say, if we are trying to go somewhere, strategically, or we need to improve. If you're a digital first mindset, you're saying, Is there a technology that will help us do that? It doesn't mean you'll purchase it. It doesn't mean you'll go there. But you always ask the question, is there a way through the advancement of technology that we can get there, instead of

assuming that you're going to work in the way that you've always worked to solve that problem? It also is very broad, if you just look across and we'll do a poll here in a few seconds around, who's doing what now already. So again, thinking broader getting beyond thinking, Yes, I have a patient portal, I can do schedule a line, two other advances in technology that you might bring about. What Johnson and Johnson

Speaker 3 [11:09]

Johnson and Johnson consumer health, we are touching the lives of a billion consumers every single day. And when I think about those consumers and what they need, and how they need and when they need, that has evolved over time. And what consumers are saying to us loud and clear, is that I want every product, I want every message I want everything that you bring to me to be personalized. For me, we need to bring forward a different way of working. And for us, the way we consider that is a digital first mentality and mindset. Digital first for us, isn't just about saying we're going to digitize everything we do. It's a digital first mindset. It's about the way we approach problems. It's about the way we approach solutions. It's about the way that we take on every challenge that we face every day. And quite frankly, that's what we love about being a consumer, you never know what kind of problem you're gonna get in any given day. But now we want a digital first mindset to solving that problem. So along with the digital first mindset comes a whole host of new capabilities that we want to bring and further cultivate into our organization. You think about things like data sciences and data analytics, the ability to use artificial intelligence to our advantage, the ability to use data to our advantage, natural language processing. These are not the ways in which we've typically done business in the past. But these are the ways we must do business in the future, particularly if we want to serve our patients in the way they want, when they want how they want every day.

Speaker 1 [12:41]

And so, you know, I think that quoting that, again, as a leader, I would go a little bit further than just thinking about the consumer. And I also want you to think about your workforce. You know, my daughter is a 26 year old new career working in a health care organization on an ACT team. And in her first year of employment, she was talking to me about it, and she said, Mom, I don't need more money, I need tools. And I was like, Okay, well, let's have a discussion about because you know, she's barely making ends meet on her salary. But her point being at her, you know, at her young, 26 year digital native life, she is very used to having technology and capability. And so as you think about your generational growth of your company, and you're retaining, particularly of new leaders, young leaders, it's a digital world that we're moving to so thinking about all of what he had to say, relative to not only your consumers, but the people. So we're going to do a little poll here quickly get you engaged with us, I'll give you just a chance to you can do it two ways. One, you can go out, if you have your computer in front of you, or you want to go out to the web, you can go to that poll site. When you pull it up, it'll ask for your name, and I think you hit next and you're ready to go in and contribute to the survey, or you can text to 22333 and text open minds 816. And it will get you set up. And we're just going to do a little sort of survey of the audience. I do recall that qualified because our sponsor actually did a survey back in fall of 2022 and ask similar questions. And so if you haven't had a chance to see that you can also find that out on the open minds website. It kind of gives you a feel for what you're doing relative to your peers and in advance using advanced technologies and will kind of square up some of what you're saying to us today with

Speaker 1 [14:55]

my organization is using a digital social media Approach A or B? It's a It's true? Yes, we're using a social media approach, just like we said, go out to Twitter or go out to LinkedIn, how much of that are you doing in terms of really brand awareness and letting people know that you're in the community and the services you're providing? So it's yes or no, be as false. Most everybody

Speaker 1 [15:30]

my organization has digitized some aspect of our website. So this might be where consumers can come in, and schedule an appointment. Or access, maybe educational materials for your consumers, something to that degree, lots of that. Excellent.

Speaker 2 [15:52]

This is probably contrast between an activated website where you have engagement, or is it pretty much brochure where? So the true would be it's activated or activate be false would be it's just brochure where it just says, here's our locations are on the

Speaker 1 [16:11]

screen, that you can click and say, here's our locations and read about that sort of read our mission statement. Yep. That's great. How about using clinical decision support? So this would be whether it's embedded in your electronic record? Or maybe you have an augmentative solution in some way that allows for clinical information to go out to your team that would support evidence based practice decision support? Not not as much. That's pretty, I think, in keeping with the qualified survey from last November, so beginning to move, they're not quite there. More organizations implemented a digital solution. What about workflow efficiencies. So using any kind of automation, whether it's an HR platform, maybe it's in the billing, maybe you're using online training solutions to meet certain requirements where people don't have to come together face to face, any solutions in that regard? Lots of people doing that in one or more areas of life, cool. Smart Home. We're gonna be doing a smart home Expo at our Open Minds technology and analytics Institute. It's upcoming at end of October 1, one ever. But we've we've really gotten very focused on what's happening, someone mentioned the rapidity of the use of these tools and technology. So a little bit of focus on tools that are available to basically support people living in place. developmental challenges, disability challenges, aging challenges. multimorbidity. So be very interesting. And what else we got anybody using a patient engagement platform where you have consumers who have a web web portal or website that can help them monitor and manage their own self management, maybe stay in touch with their therapist or coach during the week, maybe get information about medication or transition? A lot of these are applications that are I call them augmentative solutions. Embedded?

Unknown Speaker [18:31]

It's it's pretty high percentage.

Speaker 1 [18:32]

It's interesting. That's awesome. Um, how many of you actually are embraced and leading with a digital first? I guess we started with saying the app. It's basically a is there an app for that? Not so much yet. Yeah. Well, moving on. Interesting. Well, cool. Thanks for sharing. My internet is logged up here. And it says smile with people wanting to come here. So let's talk about technology. of quick quickly. You know, you have to think about technology, not just as meeting your required performance objectives, but also how to create that in competitive environment. I go back and replay the Johnson and Johnson person on the video in terms of how Johnson and Johnson thinks about using technology to engage with those 1 billion people that they're touching. It's the kind of mindset as nonprofit behavioral health organizations, which I think largely it's the audience here, we have to adopt that same mentality. So how do we get not just what we have to do, but how do we move to that competitive position and really leverage technology to help us get there? You know, we're moving from what was originally and this is Actually pretty fast, you know, moving from electronic record as what I call a billing tool, a way to capture codes and submit claims, to using it to check other boxes, which might have to do with performance reporting or contract requirements, all the way to a platform that really helps you be more strategic and competitive in your environment. So this is kind of the evolution. As you think about adopting a digital first mindset. These are domains that you might think about, that when you create that conversation around the table with your key leadership team. And you look to ways that you want to incorporate it will help you with some of your prioritization and decision making in the question that was posed earlier. You can think about the six domains, provider network management for you really mean staff management, you know, what kind of technologies do you have in place? For example, if you have clinicians who are a part of a preferred network for Blue Cross, but there's only three of them, and you employ 30? How can you use your technology to make sure that Blue Cross individual always gets to one of those three, because that's a new revenue stream for you. But not all of your staff are a part of that preferred network for Blue Cross, that takes more than a yellow sticky note hanging in somebody's tube, and says it, Stacy, it's Jean. And it's so and so Okay, you've got to have a way to connect that on the back end, as you try to diversify your revenue, clinical management and clinical performance, we talked about using clinical decision support. You know, there is a way to use tools to help you drive to evidence based practice. But more importantly, also demonstrate the outcomes of using those evidence based practices so that you reduce the variability of all the people who are on your team with all their various experiences and gaps and skill sets. Consumer Access Services engagement, that sounds like one that's pretty close to home for most of you in the audience, because you are, for the most part, engaged with some patient engagement tools. And we know what that means about financial management solutions that can really, for example, help you track your revenue cycle management, particularly if you are managing multiple contracts that are grant based fee for service base, value Performance Base, you know, how can you use technology to help you know exactly what revenue is out there? What's in the pipeline? How long has it been sitting out there, working with one of our clients? You know, they've indicated as one of their biggest risks at this is that the money comes way later than when the service was provided? And so how do they have enough roadway to you know, keep going, waiting for, you know, the money to flow? And how can you use technology to help you manage that and close that gap? Technology and reporting infrastructure, and leadership and governance. And I think given that this is the Leadership Institute, I was sort of racking my brain, how might we use digital first mindset to grow leaders or address governance structures? And, you know, I came up with a thought or to anybody have a thought about how that might

Unknown Speaker [23:41]

appear as a digital first mindset? And how you might use it for leadership or governance.

Speaker 1 [23:55]

Well, one way might be all of our Oh, good, good, good.

Speaker 4 [24:01]

Saying that we thinking nice. We moved to go vendor for a platform to work with our we have multiple, we have two boards of directors and the amount of time wasted on sharing information via email or other other means and to to serve as both a repository but also for voting and other board functions. It's it's really been incredibly efficient. Yes. had more engagement from board people out in the probably too much.

Speaker 1 [24:32]

Yeah, say that to anybody who's done like risk, risk and reward. Great example. Is there another anyone else out there? Thank you. Let's look at some dimensions of quality. Again, as you think about how you create digital first mindset. You've got those domains. I'm going to come at it from a different angle, and it's going to be from a quality lens, we're going to use gorvins Eight Dimensions of Quality garments out of Harvard article in the Harvard Business Review, I really like this concept. It's a little small print, not sure if you can read it, but you will be able to get it in the download. Let me catch up with you here. But it allows you to think about, again, your priorities and your trade offs. So to the point, you can't do everything at once. As a leader, you do have to be aspirational. And Paul will spend a lot of time talking with you about your role as a leader in this digital transformation age. But you do have to think about also how do you sequence and stage things. So when you look at dimensions of quality, you know, the first dimension is performance. You know, so performance is around, you know, how well are we doing something in your world? It might be timely appointments, that's probably a key performance indicator for you all, are you getting people in, in routine care in a certain period of time? Are you able to address emergencies? How are you doing that? feature is a secondary aspect of performance. And so as you think about features that might take you to, well, I have a walk in clinic, I have schedule online, I can have a way to see people at all hours of the night and day, you know, so what are the different features that you can activate to address your performance or improve your performance, and what digital applications help you with that? Reliability is the aspect or dimension that has to do with people, whoever's coming in the door at whatever location you have, and you probably have multiple locations, they're going to expect the same level of service, the same response every time. And that's where some of your clinical decision support also helps is that you want whatever the external person coming in to have a reliable experience that works across all of your sites. And I know some of you know this, you have some areas where it works really well. You have other sites where there maybe it's not working so well. And so your ability to think about use of technology to create that consistency. Conformance is how well you actually conform to what is expected will go back to the timely appointment. Right? So if you're if your performance standard is to see folks within seven business days for a routine appointment, how well are you conforming to that expectation? Your ability, I loved your ability, because what that means to me and your world is business sustainability. How long is your product life? Okay, I think I saw the average sort of life of a small business

is 15 years or something in that regard? So many of you probably been around forever, you know, it's like, how do you how do you think about sustaining your business? What is your durability, and serviceability is how well you can repair something when it's broken. So that's your piece around responding to complaints, concerns, noise in the market. You know, if you have disgruntled employees, and they're posting on, you know, a website somewhere when they leave and saying don't go work there because of x x x, okay, how can you actually address that, and, and be in front of that with your digital applications. Aesthetics has to do with the appearance, I think that's really important also, in terms of your place in 2023 is, you know, using digital technology to indicate that you're in an advanced, innovative organization that really understand your culture, really understand your social setting, and that you are, you know, alive in the times, if you will. And then the last one is perceived quality. And that really has to do with customer satisfaction, net promoter score those pieces. I mean, again, I go back to my 26 year old but you know, we are so driven now by reading reviews, right? We see them all the time and anything that we are sort of engaged with externally products, we buy restaurants, we go to movies, and it's no different for our world and Health and Human Services and being very in tune to how people are perceiving you, and really working to use all of your digital acumen to address those. So think I've just gone through those here. So let's look at how you might think about evaluating and Fianna goes back to the how do you decide what to do first? You know, the key here is, first of all, what problem you're trying to solve. So when you think about those eight dimensions of quality, or you think about those six domains, what area? Where do you start? First? Where's your biggest hurt? Where's your biggest bang for the buck? That's kind of your Vout. Your sort of value metrics, if you will, is where where will you get the most workforce efficiency and cut down disgruntlement among staff in terms of things not working well, or with your consumer body? So what problem are you trying to solve? And then is there a digital first technology that will solve that problem? So you might be looking across those eight dimensions and say, Yeah, we have a problem with reliability. But we don't see a solution that digitally based to help us with that. So okay, that's a different performance improvement project. But it's not a digital first project. Going back to the guy from Johnson and Johnson, that doesn't mean we digitize everything, you have to determine is there a good fit. And to the gentleman's point in the here, it's also is there one that is available, I can get it off the ground quickly. It's affordable, my risks are low, all of those pieces have to come into play. Because if you find a solution that you think might be applicable, but it's going to take you three years to implement, but you have a three month problem, you've got a disconnect. Who will use it? How will it be used, what value will be created? This is just you know, kind of your example for if you use a problem solving method to get to how to make decisions. Pick a method, stick with it. So if you have a digital first mindset, plug it into your method, there's lots of models out there that you can follow. And there, you know, there's no, no right one or wrong one, but use your method. That way, you're not having a lot of discussion around the table. And as I like to say, leaning on the method that says he who yells the loudest wins the prize, or he who has the most power wins the prize, but you actually have a logic to how you're going to make decisions around moving with a digital application. The example on the right, and I've seen this pretty consistently with people I'm working with is that post COVID. Productivity hasn't bounced back. And so generally, what I'm hearing is people are running it sort of 80 to 90% instead of at 100%. And so what's the problem? And being able to say, Well, is it that our referrals dropped off? Is it that our staff or is the productivity actually dropped? Or is it the referrals that have dropped? Is it because we have vacancies? Are we having trouble with churn and not being able to keep all of our positions fill? Is it the fact that we don't have a easy access to schedule appointments, we're doing telephonic appointments, you know, one agency I worked with, they're still doing phone, call telephonic appointments, but they were down to like one staff manning the phone. So they were losing a whole lot of people coming through. So understanding what problem are you trying to solve and then flipped your

digital potentially digital solution to address it is a is how you want to go. That's pretty much what I just said, for the callot logic model. This is a very common model and program evaluation. Some of you might have used it already, it's very often applied to grants. So if you get a federal grant or a SAMSA grant, a lot of times they're going to ask you to plug in the information following a Kellogg logic model. And it allows you to get down to So what are the solutions that might be available to me and as a digital first solution, the way to go? These this is just another example of

Speaker 1 [34:04]

of that process. So I'm gonna give you about three minutes here want you to think about sort of what we've said around the domains gorvins model of excellence. And if you were going to think about what problem in your organization would you try to solve today right now? What area what a digital solution? How would you go about that? give that some thought and we'll ask somebody to either share or share something you've already been doing. Or maybe something that's now percolating, in terms of a new idea that you might have taken in during the course of today's seminar already. So we'll do the doop doop doop doop doop doop and I'll be quiet so you can just give it some thought. Talk to your neighbor, especially if you're sitting by Colleen Think about what you might take back with you and will ask for a few shares

Speaker 2 [35:04]

or even if you're sitting next to someone that you don't know it could be they have great ideas they have great

Unknown Speaker [35:08]

ideas don't okay on top of that go back tell me when this one okay

Unknown Speaker [35:45]

should have set my watch I gotcha

Unknown Speaker [35:59]

it's a little hard to sit under the lights do you want to live like

Unknown Speaker [36:13]

that my hand coordination is working pretty good

Unknown Speaker [36:54]

two more minutes. Two more minutes.

Unknown Speaker [36:57]

Two more minutes but we might have opportunity

Unknown Speaker [37:04]

there's a buzz

Unknown Speaker [37:07]

bit good dialogue evidently.

Speaker 2 [37:30]

Put my name badge like on the edge of it. So, yeah. Is that your wallet? Oh, this just says business cards and it has no coincidence. Yeah,

Speaker 1 [37:43]

I noticed how sleek it was. That's why I'm wondering what you weren't using it for

Unknown Speaker [37:53]

another minute.

Speaker 1 [38:35]

All right. Okay, let's see. Who has something they would like to share as an idea with this song with the audience. Give us up. Who's a courageous volunteer to share some of your conversation that you've been having? And which, which framework did you use? Did you use gorvins? Or did you use their domain? Or Euro? Or your Are you on or your own? Anybody I have something to share? Thank you.

Speaker 5 [39:23]

Yeah, we were just talking about our human resource department and how employees self managing their own compliance issues, be it degrees or tuberculosis shots or whatever, would be a much better way than chasing paper. And so we use I think both models appointed the two of them to try and get to how, I don't know how digital solution would look yet but it seems like there ought to be one.

Speaker 1 [39:50]

That's a great, great example of letting employees manage their own information, keep it up to date, holding them accountable for that. and seeing if there's a solution through a human resource, solution or

tool. Excellent. I could see you even, you know, I'm advancing my own idea here. But you know, maybe if you're into performance based compensation, you know, a little bit of, if there's opportunity for bonus, even if you tied a small amount to that you kept your information on, you kept your credential, you kept your training up, you know, that might even be a way to provide further incentive to that employee, you know, through some of that extra earning, they might get at the end of the year, whatever. So thank you for sharing, it's a great creative idea. Anyone else? Well, thank you appreciate your sharing. Let's look a bit now at competencies. And as I record, here, we're gonna talk about let's talk about the people and the processes. And we talked a little bit about thinking digitally, having a digital first mindset. But let's remind ourselves, why does anything moving forward with technology adoption, tend to fail, okay, because this is going to drive you to your people and your processes for having success with whatever steps you take. Number one, lack of planning, lack of thinking about the workflow. You know, as you all know, and Paul will speak to this, if you adopt a new solution, and you haven't prepared your team, your staff, you don't have their buy in for it. And you think that somehow, you're going to flip a switch and tell them to turn on and start using it, you usually don't, you don't get very far. So lack of having executive team commitment. So at the very top, for those of you who are at the C suite, or the CEO, you know, you have to have commitment to the change, you can't just say, Oh, this is something that IT departments going to do, or the HR department's going to do. And you often tell me about it later. But really embracing it all the way. And the importance of aspirational leadership in this regard. And really walking that talk and being committed is so so key, and often why technologies, adoptions fail. tied to these two is just cultural resistance. Anytime you're in an organization, any kind of resistance, it's just sort of a natural tendency to have people among your team members who are going to say, not only why are we doing this, but I don't really want to change my process works for me. And so why do I need to change and get on with the program. So really being able to have a culture that embraces change and supports people along the way, wherever they are developmentally with the process, turnover and staff, if many of you are small organizations, if you have an n of one, who's leading the effort, and they leave, what happens and so that's a big risk. And so being able to think about how you actually incorporate something, if you're if you're a lean team, erroneous analysis of return on investment, we will spend some time talking about this, because if you over promise and under deliver your thought, not only with your team, but your board. And so being very careful to be conservative in how you're estimating your benefits of the engagement, and how the long the long length of time it will take to get that return. And to the gentleman's point earlier, you also want to be able to have big, you want to have success early. Right. So there's this really thinking of having some quick wins early to get people really enthused, but also be able to project and not over promise your return on investment, you need to make sure you spread that out in a reasonable way. And then also just not having enough money, you know, needing, you know, meeting a Cadillac, but being able to, you know, buy a used Chevy Nova. You know, there's a big disconnect there. And so just really being able to think about, you know, what can you actually do? And how do you have not only resources for the immediate but over time. So let's talk about each of these, you know, managing the implementation, project management is such a key to managing the implementation. And you're going to need someone who understands how to do project management maybe is certified in project management, maybe knows how to use software to manage the project. You can't just, you know, assign somebody who doesn't have it's a very specific skill set. Sorry. That's my slide. And thinking about not only the tasks of the project But the change management process that has to also go along externally, it's not just getting the technology on board from a hardware software. But it's also how you are prepping your staff training your staff, preparing them to accept the change. So managing the implementation is key. You have to find somebody who has a lot of really, really good skill sets. And if you're like most organizations are no, you always have a couple of people, they tend to be people who have been on staff

for a long time, they might be in a CEO role or a director level role. And they've got all of this and more, right, they're a good collaborator, they're communicator, they're responsive, you know, they know how to take notes, they know how to facilitate problem solve, but guess what, they've already got 13 Other projects, right, because you've called on them over and over and over again. And so just you have to have the skill set, but how you find it and how you don't have it be another tag on for that person who, oftentimes, I think it's the quality director who since tends to be in that role, and who gets sort of overwhelmed with all of these projects. So it's just something to think about in terms of project management, we'll talk more about leadership as we go. So I'm not going to spend a whole lot of time here, although, just to say that, you know, if you're not sold, if you're not, if you haven't bought in as the CEO, you're gonna have a real hard time bringing everybody else along, you've got to, you've got to have your own level of engagement. And you've got to be able to have that leadership skill, if you will, to speak out aspirationally and bring people create the vision, you do need that project sponsor, it typically is the CEO or ce o, they are the person for saying, here's what we're going to do, here's how we're going to do it, they manage the resources, they manage the change, they don't manage the project, but they are the sponsor. And a way that you might think about using technology as if you you are implementing something new, you know, your project sponsor could have a little video chat once a month, that speaks out to everybody at all locations that says, here's where we are on that project, let me give you an update on this transformational thing that we are doing. And they create that enthusiasm with their voice with their presence through technology. You need a steering committee. So it's not just again, the IT director or the quality director, but you put people around the table who are going to offering and leverage their resources and leverage their time to implement the change, you're going to want to make sure that you have a project manager in that group, you know why to change, why does change Vale better make sure I catch up here. 92% of why change doesn't happen is because of the leadership failure. So when you look at your C suite leadership, your project manager, your steering committee, you know, at the end of the day, you are the most important person in the process in terms of really carrying it through to the end. It's important to have a cross functional team and let me go go to here. Because think about where you might have fault lines in in your team members. So if you assign a project manager that doesn't have good attention to detail, or maybe they're external, okay, so let's talk about you, you're implementing a new electronic record. And you allow the project manager to be on the partner side. Not internally. That partner doesn't know your culture, they don't know all of your nuances you really are at at a weakness if you if you see project management out externally to another organization. clinicians and supervisors, they're very important to include and all go back to subject matter experts. You want to have people who are going to be using the solution to be a part of the process, whether it's a clinician, whether it's a direct care worker, they're the they're your subject matter experts, right? It might even be your billing staff person, whatever technology you're going to be implementing. You want them at the table to tell you frankly, how it's not going to work.

Speaker 1 [49:48]

You know, so when when they say let me tell you what the problems going to be, you can address it during the implementation phase, you can begin to think about how you're going to need to create a change or a new workflow. Um, the challenge with it is often these are people who cannot be consistently involved, right, particularly if they're available staff person, they might not be able to make every meeting because they're doing a billable hour. So you have to be able to figure out how to bring people in, but recognize that they might be inconsistent, your financing your IT team, you know, if, if you have rigidity in either one of those departments in terms of risk aversion, not not looking out and and thinking about how

to project your not only your cost, but your return on investment, if you have an IT team that doesn't completely scope out the project, you know, it people are vulnerable, if they get excited about something, and they think, Oh, this is going to be a new project, I'm gonna get to implement it, you have to be really careful that they don't miss some of the red flags, because they're so excited that they just want to sell everybody on doing it if you if you get material. So these are just things you have to be aware of they happen in every organization. So let's talk about analyzing ROI just a bit. And I think I said all of this before, but make sure that you are strategically focused in any digital first mindset, that you're not just falling for the gadget gadget. You're not just doing something because you heard your peer, two counties over is doing it, and your staff got wind of it. And so now you've decided you need to do it, too, you really need to understand strategically, what problem are you trying to solve and what works best for you. I know how our world is very small, right? Like we all talk to each other, even across state lines. And we do a lot of sharing and swapping. And that's wonderful, but also be able to look at independently, what does your organization need, bring everybody together collaboratively techniques of technical, operational financial, to bring people into developing your assumptive models around return on investment. And it doesn't have to be just money. There's qualitative and quantitative benefits, what's going to really be the benefit to my team, to my department, and be able to build that into your model. And as I said, make sure that you're working far enough out, but have a really accelerated time period. In the beginning, you need to celebrate success, and you need to celebrate it quickly. I have a number of organizations that I hear from if you say, how long have you been implementing your electronic record? And I hear two years, or two and a half years, and I'm going that's just, you know, that's just a drag now, you know, on your system. And, and so you have to be able to think how do you have clear you might be you might declare success, and then go to phase two, you know, as a start of a new project, some some ways of using language and project management, to not just feel like it's an endless implementation of any kind of technology that you never see the benefit. Is is really important.

Unknown Speaker [53:27]

Thank you think upset all of these, let me just go through.

Speaker 1 [53:35]

See if there's anything want to. We talked about can you afford the technology you need? You know, it's important to know how to budget for your technology both? What what do you capitalize and what do you consider operating expense, capital, being able to capitalize on your investment allows you to project out? And you know, because it's usually pretty big, right? And so if you're wanting to show to your board, how you're going to actually invest in this solution. And, and it's going to spread the cost over time, as well as the return on investment. Understanding that from a financial perspective is important. So I'm going to turn it over to Paul now. And we're going to talk more about leadership and culture. And that's going to bring us up to our break, indeed. And so here you go.

Speaker 2 [54:31]

Thank you, Carol. Did she do a great job? Definitely. She actually makes presenting afterwards more difficult. But you know what I want to talk about now. I mean, she's Carol spent a lot of time talking about a lot of the things that are critical to having a digital first culture and mindset. I'm going to talk about

culture a lot because I think it really does matter. I'll tell you a quick story. I've had the privilege of being the CEO of a couple of different organizations, one was the largest outpatient radiology company in Florida about 10 years ago, and that company was not making any money, it was 10 of flat EBIT da, or on 9 million total revenue. And they needed a complete, massive change. So it was actually a 5050 joint venture between what's now known as adventhealth, in the radiology group, in the Central Florida market. Long story short was, I realized that culture matter. And I believed, based upon everything that I knew in my career, that if you place a healthy culture, it's going to become financially viable and make the organization accelerate in terms of what its capabilities are in the middle of all of this change that had to take place. Number one is that the company had a horrible reputation in the market couldn't hire anybody, you some of you could probably identify with having a hard time hiring people because of wages, etc. But this was just a reputational issue for for the company. But bottom line was that we rallied around the idea that the customer Randor, and we had to get into defining who the customer was fast forward new leadership group, because leadership matters a lot. We'll talk about that in a minute here. And the company went in two and a half years from being a \$9 million company to being a \$68 million company with no profitability to having a 38% EBIT, da. So the reality is, is that the first thing we did was change the culture. In other words, the metaphor I use as a leader was, you know, what healthcare is headed westbound. Nothing wrong with West, those of you who live in the West, great place love to visit, but we're gonna go east, this, we're just making a strategic decision to do a lot of things very differently. And we're going to put the customer at the center of it. So in a digital first environment, you have to have kind of a battle cry, because it's really going to be a lot of people don't like change, we work in the change industry, those of you who have been around for a while, the fact this is the change is a regular part, sometimes it's a daily occurrence, right. But when we go through a digital transformation within an organization, it's a big deal. And a lot of people resist that. And we could talk about the differences in the generations. But the reality is, is that change is hard for most human beings. But the reality is that we have to kind of change that mindset, and really work on it in a unified manner. I believe that having the idea around the customer matters. And being a leader and leading with that mindset really does matter. So I'm going to just talk to you for a minute about everything that Carol said, and I want you to just allow your mind to go to this idea of how do you transform the culture of your organization, I'm sure some of your organization's are amazing, you have a great culture. But the reality is that many of you have not been through a massive, massive change that really is required around a digital mindset. So that's what we're going to talk about. So we'll go through those of you pull your mobile phones out or your laptop back out, because I want to I want to get some input here. What is the first thing that kind of comes to mind when you hear the words customer service? So again, those of you who are new to the, to the seminar, since since Carol was presenting earlier, you got to polivy.com on a browser, open minds slash open minds 816. Or you can text open minds. 816 222333. I'll give you just a minute if you haven't gotten in already. Because I know several of you who are new to to this, so we're gonna we're gonna go through and I just kind of want some input. Well, something went wrong. Did we lose our internet connection? Peter? No. I don't know, then we can really do this. try restarting PowerPoint. Right. I think we're gonna, though those of you who are typing in putting this in, I appreciate it. Let me just tell you is that when the slides are all produced, we'll know what all of the ideas are when you hear these words, but I apologize on behalf of whatever technology failure has happened here, the digital first mindset. So let's let's talk about me just go back for a second. So just in terms of thinking about bad service examples, I promise you if I went around, we had the time. Every single one of you has an example of something that's happened to you. That is a horrible customer service experience. So you know, if you think about it, where Do they commonly occur in here, I have a quick list here. But I am absolutely certain that many of you have the same kind of story, if you will, probably are very similar in many regards. So I think it's

important to acknowledge, you know, that each, each one of us as leaders, it's important for us to kind of take the reins on the idea of great customer service. And it does all start with leadership. And leadership does matter, especially when you're looking for a cultural change within an organization. Your role in your senior management role become super critical. One of the most important things is having kind of kinks in the armor, which is, I think, a fatal fatal flaw when you're doing when you're making a massive cultural change. If people see you as a leader, with problems about, say, digital transformation, in other words, I really don't like computers, I really don't know how to use my mobile phone. In other words, those common comments that you might hear, because you're not comfortable with it will destroy any initiative along those lines. And I think it's important for us to realize that not only you as leaders, but also our managers, middle managers within organizations and everyone who kind of follows even if it's a line staff individual that many people look at, and they have influence into how people behave, it really becomes super critical, because honestly, it's impossible to win when you have people that are poisoning the well so to speak. So I think it's important for us to look at and understand what your leadership role is and then how you communicate that as part of your cultural change. I have a quick video that will illustrate this I think pretty well

Speaker 6 [1:01:49]

let's go show me something 10 yard move and move it let's go Let's go man. Let's go Let's go Jonathan show me something. Show me some power no nice brown W something there we go. 10 yard dumpster muscle damage the power

Unknown Speaker [1:02:20]

so Coach How strong is Westview this year while strong we are you already written Friday night that is the last block well not often that we could beat them can be abroad to Jeremy What am I in trouble now?

Speaker 7 [1:02:40]

Not yet. I want to see you do the desk crawl again. Except I want to see your absolute best. What you want to go the 30 I think you're the 5050 I can go the 50 if nobody's on my back thinking Jeremy on your back. But even if you can, I want you to promise me you're going to do your best. Your best. Okay,

Unknown Speaker [1:03:03]

you're gonna give me your best. I'm gonna give you my best. Alright, one more thing once you do it blindfolded because I want you to given up at a certain point when you go further.

Unknown Speaker [1:03:14]

You know, Jeremy get on his back good time hold Jeremy. All right. Given us off the ground just your hands and feet. There you go. There you go

Unknown Speaker [1:03:39]

you go.

Unknown Speaker [1:03:47]

Go Brock. Good string

Unknown Speaker [1:03:57]

said rock. I said

Speaker 6 [1:04:00]

20 yet get to 20 you give me your best you keep going. That's it. No, don't stop rock. You got more than that. Just wrestling. You gotta keep moving. Let's keep moving. Let's go. Don't quit till you got nothing left. Now you go. Keep moving. Keep moving. Keep moving brought. Let's say you keep driving. Keep your knees off the ground. Keep driving it very best. You're very bad. You're very blessed. Keep moving rock. That's it. That's it. That's it. Keep going. Don't quit on keep going. Do keep driving. Keep your keep your knees off the ground. That's it. your very best. Don't quit on me. You very left. hate driving. Keep driving. There you go. There you go. So you keep driving. Keep your knees off the ground. Keep driving. Don't wait till you got nothing left. Keep moving. Brock. That's it. That's it. That's it. Keep going. I want everything you got. Come on. Keep going. Don't quit your very best. Hey, Dr. Dre. Oh, there you go. There you go. He's heavy. I know who said and you negotiate with your money to find more strength but don't you give up on me Brock you keep going you hear me? You keep going to do is good. You keep going. You're not well, you keep going. You keep going. You keep going. It's our from here. 30 more steps. You kicked off rock. They die and let you keep doing rock tomorrow. Tomorrow. Didn't go and you probably your best. Your best does stop kick. Don't come on. Give me more. Give me more 20 More 20 Gig give me a bath. Tao quit Okay, darling. Darling. Doubt doubt doubt whack rock galley it all came down you know when you get down dead last dead. Dead. Dead dead dead solid

Unknown Speaker [1:06:18]

Brock come on down to Mr. Mr

Unknown Speaker [1:06:38]

got Brock, you're in the endzone.

Speaker 6 [1:06:48]

Rock, you are the most influential player on this team. If you walk around defeated so well then. Oh, tell me you can't give me more than what I've been seeing. You just carried 140 pound man across this whole field on your arms?

Unknown Speaker [1:07:01]

Rock I need you. God's gifted you with the ability of leadership? Don't waste it.

Speaker 7 [1:07:14]

Can I count on? Yes.

Unknown Speaker [1:07:24]

What is oil 160? I?

Speaker 2 [1:07:40]

think the message is obvious, right? If the transformational change happens as a result of commitment. And obviously, a negative, completely capable individual can have a huge impact. And when you look at this is just as a metaphor. It's I think a lot of what needs to happen for digital transformation. To be effective within an organization, Vince Lombardi had this great quote, I love quotes, by the way, those of you know me, leaders are made and they're not born. They're just they're made of hard effort, which is the price that we all must pay to achieve that any goal that is worthwhile. Now obviously, a digital transformation is not only worthwhile, but necessary. As the years move on, and as technology becomes more critical to our environment. And Mother Teresa said, don't wait for leaders do it alone person to person. And this is really a message back to kind of that quote unquote people that don't think that there I'm not in a leadership position. I'm not the CEO or in the C suite. So what should I do? I mean, this is really kind of that mindset is is that everyone kind of has that impact. And then Peter Drucker said, the single most important thing to remember about any enterprise that there are no results inside, this was a result of of a business's a successful customer satisfied customer. I think that's true in our business. And again, I think it's important for us to acknowledge who are our customers so obviously we think about patients consumers clients, within each of our organizations as is our customers but we have more than that I think it will talk about that in a second. So Disney said do what do it so well that they will they'll want it I'm sorry, do what you do so well that they will want to see it again and then bring the friends that's which I think is really the case is that we aren't necessarily kind of in the entertainment business like Disney but certainly the metaphor there is obvious and then Coco Chanel for those of you who you know have the cynical environment thinking that you know we're going to force change to happen rather than really using culture is Coco Chanel said don't spend time beating on a wall hoping it will transform into a door. I think again, funny funny transformational concept here but it there's a lot of truth in this is that we have to also realize that there's some people that Change is just not going to be in their DNA. And in certainly that becomes a real problem. So the metaphor I used, and I think it's one, you know, invite you to use it as well. But, you know, if you think about, again, the kind of change that has to take place within an organization. And again, if you think about the customer, first and foremost, the one that I used in the companies I ran was raving fan customer service. And those of you are familiar with it. Ken Blanchard wrote a book called raving fans, and we'll talk about that just a second, not at nauseam, but really quickly. So think about it. Who are our customers? Besides, you know, obvious, the obvious first one is each other, right? You know, fellow associates, people that work within your organization. Obviously, another one might be referral sources, people that refer to your business in one way, shape, or form, whether that's primary care, or some other methodology. What about vendors? are digital partners, if you will, they

are customers as well. They are prospective customers, potentially, or a family member might be a customer. But vendors can be a customer. What about hospital administrators? Those who use the health systems within your communities, all of them? Certainly our customers? What about these guys, health plans and payers? Definitely customers, right? A key customer, their customer satisfaction is incredibly important. In each of your enterprises. Those of you who are in provider organizations, and of course, our clients, consumers or patients, obviously an important one, but we tend to focus on them in them alone, when we think about the customers themselves. I think, you know, when you think about customer service in general, I think most metaphors for how people think about it is this is that we just get inside the box, we keep doing the same stuff. And you know, we'll do our net promoter scores, and we'll, you know, measure it, but we really won't do a whole lot about it. But we have to get out of that mindset, we have to also think about how we're going to create transformational change within our organization. And I said to you, those of you who have not read this book actually bought this book for 707 100 plus employees, and I made it required reading, actually quizzed every single person in the company. It's a simple book to read, even people that hate books and don't like to read. I mean, you could read this book in one evening, but it, it really is a great metaphor for, you know, doing something extraordinary. And, you know, just quickly, you know, the raving fan concept is that they're, they're basically individuals who not just embrace your message, but they really, you know, need to become marketers, if you will, the concepts of raving fans, number one is decide what you want. That's concept number one there three. So basically, think outside the box. In other words, and I always said, let's get rid of the box. The fact is, is that getting an environment where you want to come to work every day, and you're excited, should be kind of the first piece of this, this transformational change. The next one is to define decide what your customers want. And there will be some customers that you don't want anymore, because they really don't fit this model. There are not going to be many, but there will be people that kind of just don't get it. But the fact is, is that we have to identify those things. And really, the simplest way is just to ask them, what is it that they want. And then this has been set in many ways. I mean, Disney used his plot plussing thing, but this is deliver what you promised plus one. So in other words, it's incremental change that continues to grow in and really kind of evolve from there. I think those are really important, very simple. And you can apply these concepts to anything across any enterprise, regardless of the of the job situation. So whether you are the CEO, or whether you are part of the kitchen, janitorial, clinical staff, secretarial administration, everybody fits into this model of really needing that kind of transformational change. I wish I had stories, the time to tell you stories. And those of you want to hear some of my stories about this change that happened within these organizations. It's almost comical in some ways, that what can happen when you really kind of create this unwavering commitment to change. And it's contagious. That's the one thing I can share with you. That's really important. I just want to share three quick examples of organizations that are renowned for for customer service. First one, of course, is Ritz Carlton everyone hears about Ritz Carlton, they actually have a whole training program that you can put your organization or individuals through, obviously, their their concept is that they empower people at every level, basically to spend up to \$2,000 on the spot to make a guest happy. So there's lots of stories that are legendary, literally within the come from Ritz Carlton around employees that make great decisions that Created evangelists around this brand. And that's how you do it is that you have to empower people, you have to train them first off, about how to do that. But also then you have to empower them. And that's really super critical in terms of kind of making that transformational. The next one is unusual. It's a Canadian gas station company called dough of gas. So they, Chris, we live in the, you know, self serve environment, right, where you pump your own gas, well, not Domo, they basically come out and they pump your gas, it's no more expensive than self serve gas in Canada. And, oh, by the way, they check your oil and clean your windshield. There are people that will drive up to 27 miles out of their way to go to a Domo gas versus filling up themselves in

Canada. So again, customer service matters. A cultural environment where they set a standard to say here is the way we're going to treat our customers. And it literally it becomes part of your DNA of your organization. Maybe the last one is Nordstrom, Ken Blanchard, who wrote the book raving fans, quick story, he he was he was in San Francisco, they just closed that store, by the way, which is interesting. But Nordstrom is in San Francisco, he was there for speaking engagement. And he was gonna buy his wife a gift for their anniversary. And he went in, he'd seen it before. So he went in with a piece of jewelry. And he, he went in to buy it. And they were they'd sold it. And he was pretty depressed because like most guys didn't have a plan B, right. So

Speaker 2 [1:16:33]

the associate behind the jewelry counter saw that he was kind of like, Well, number one is he was guy, so he didn't have a backup plan. And number two is that how am I going to help this person solve this problem? And they the associates said, So how long are you going to be in town? So I'm just here until the end of the day. And he goes, can you stop back by here? He goes, Yeah, just gonna be down the street. I'll stop back by and he can buy answers thinking well, obviously maybe they have a shipment coming in and he'll get but anyway, she thought by later on in he goes to the jewelry counter. And there it is. The jewelry is gift wrapped. Ready for him to pick up? And he you know, he's very appreciative. Thanks. By the way, what how did this come about? Because, well, I knew this jewelry store down the street had it, we went and bought it, pay full retail, and brought it here, gift wrapped, made sure that we you were pleased. So think about the value of that. Nordstrom made \$0.00 It probably was a net loss. Okay, let's say the jewelry store down the street kid doesn't have the buying power. But the fact of the matter is, is that that story has been told 1000s 10s of 1000s of times, how valuable is that to that brand versus the \$2 \$20 \$200 that was necessarily lost on a single transaction. Our business is very transactional at times. Same principle applies here is that be inspired by some of the way the retail environment works or other types of businesses where there's so many great examples of those that you can actually use in your environment. So the first thing I would say in terms of thinking about making that raving fan experience is consistency about how whatever it is anyone is responsible for and how it's delivered really critical. And then the other one is that everyone says oh, we're going to make this massive change overnight. Well, that's great. Congratulations for making that kind of decision. But you have to really start small, and figure out how you're going to do that you have to develop the roadmap, if you will. The next one is that you have to kind of meet the customer's expectations if you're not already, and then exceed them beyond that because raving fan will go out and basically wave the flag saying I love this organization. They are it's literally universal. It's not Oh, we occasionally get one person that writes something great on social media. It's literally a universal statement about everything you do. systems and training are very, very key. So they you have to demonstrate it to individuals in terms of how they do it in the digital transformation environment. I would argue so if you're going to do an EHR implementation I did one years and years ago, I picked the oldest psychiatrist who was a curmudgeon hated technology, hated everything about it. And I made him the champion. And he learned to type in he learned to use the computer and he became literally a raving fan of the EHR. So everyone looked at this guy, so we'll see if he's happy, I guess I gotta be happy to. So I mean, part of this is that you have to kind of adopt that mindset and use training as part of it. And then you have to be committed to the 1% rule. And that's a 1% per week improvement, which will net out to being 52% compounded, which is massive, massive organizational change. And I think the last one is that you have to be flexible because a lot of time As we get, especially as leaders, we cast a vision, we have a big idea about what this is going to be how fast it's going to happen. It's sometimes we have to potentiate that along the way, but staying true to

the commitment of it is really kind of the super critical component of it, I think. So I think, you know, if you look at, if you look at the translation, so, the writers of the book basically said, you know, people do expect bad goods and rude service, give them junk, and they're not surprised. And that's the, that's so true and healthcare at large, is that we go in with such low expectations, it's like, we could talk about the airline industry, we almost expect to be squashed in an airplane and treated rudely and have our flights delayed and canceled and all the other things, what would happen, if that was a tremendous experience, we could do that within organizations and really kind of stand out in a very, very significant way. Just what they expected, I mean, that that meeting someone's expectation is not going to make it and I think a lot of times healthcare especially does that, in when you think about digital transformation, this becomes a key component of it, you know, basically saying, you're saying to the world, we're no worse than the competition, we're just part of part of the system, if you will, you don't want to be part of the system, you want to stand out and be extraordinary. So and again, you know, we do live in a world where people's expectations, again, especially in our industry, where, you know, your, your expectations are, typically you expect them to be failed. And basically, when something great happens, it's like taking the yellow marker saying, look at this and look at it happened. And I want to go tell somebody about it now, because it was great. You want to try to drive that through every single, you know, customer interaction, and remember all of our different customers that we have. So again, I think, you know, the next one is what's the point of all this, you know, again, you think about the 1000s and 10s of 1000s. And in some cases, hundreds of 1000s of dollars, that are spent on websites and promotional material and trade shows and bridges, bringing people into the facilities that we have, you know, basically, we are not investing in our most important marketer, and that's our customer. And again, remembering all of our different constituent customers. So, you know, thinking about the way we measure customer satisfaction in especially in a value based world, this becomes super critical, and it's going to become even more critical to all of our organizations. The fact is, is that we do use net promoter scores, we do use surveys, etc, etc, I actually use a paper survey 10 years ago, and literally, it had my cell phone number on it. So you think that had an impact with the staff, your cell phones on there, I gotta make sure this person is happy before they leave in the reality is, is that if that was one of the motivations, great, but the fact is that I got two phone calls over two and a half years. And they were both to compliment people. So the reality is, is that and I'm not saying that it's applicable, you know, there's a different translation from radiology, to the world that we're in. But the reality is, is that you have to be able to measure it in a way that's meaningful to your organization. And again, if you think about it, 96% of unhappy customers never complain. And that is death to an organization, you have to have a way of understanding what is it that people think about your organization, and it goes beyond net promoter scores, it goes, it goes into having interactions, having people demonstrate that in a very pragmatic way, you know, and again, a dispatcher, dissatisfied customers will tell nine to 15 people, and that, again, you know, when you think about that being amplified is absolute death to any organization. So better ways, you know, you know, in terms of thinking about customer service, front desk scheduling anyone in contact with a consumer, and of course, the best method is to ask, ask them directly, you know, you're having service recovery be part and parcel of the training that takes place, and again, listening to people in their attitudes. So, you know, so this kind of gets down to, you know, so what now what, you know, which is always kind of the bottom line. So, I think, you know, understanding as leaders, that you have a huge impact on your organization's ability to control customer service. And again, when I'm talking about customer service, I want you to think about digital transformation in that same vein, because again, it applies, remember, fellow associates in your culture becomes part of it. And whether you use customer services, your battlecry or whether you something else, it doesn't really matter. But the fact is, is that we as leaders have a direct impact on digital transformation. You have the ability to control whether your organization is successful, and you have to

be the catalyst for that kind of change. I think it really comes down to this Is that how is it on a daily basis, you're investing your time, a lot of us kind of forget the fact that we have and are responsible for the cultural and the overall health and wellness of our environment that we come to work every day, I want to come to work in a place where the culture is healthy. And we have a lot of things that we're doing in common. And we're driven together. And that's kind of the mindset here. So again, I think it's important for us as leaders to realize how it is that we're investing our time because it has a direct impact on people. So watch this. Are you ready?

Speaker 8 [1:25:37]

Yeah. All right. 62nd Spot on time. Can I have a clock in the corner?

Speaker 9 [1:25:42]

Is there thank you. Rolo, rolling,

Speaker 8 [1:25:46]

action. Okay, here's the deal. We all know that life is busy, there aren't enough hours in the day to do all the things that we want and need to do. In fact, you're probably thinking of all the things you need to do next week right now, wondering how you're going to squeeze it all in. But the fact is, no matter who you are, no matter what you do, no matter how much is on your plate, we all have the same gift, or 24 hours each day is 24 hours, 14 140 minutes, 86,400 seconds, all the money in the world won't let you buy one single second more than the next guy. And once that second has gone, it's gone forever. But there goes one right now, another one gone, you'd think that we would judiciously use such a limited and valuable gift, you'd think that we would choose wisely how to spin No, invest our time. But do we really mean after taking the time for eating and sleeping and all the other basic necessities? Do we really use this gift away, we should think of all the great things you could do in 24 hours, all the lives, you could touch all the significant changes that could be made in your life and others. The fact is, you could actually make a difference in this world and 24 hours or not. So how are you investing your time?

Speaker 2 [1:26:48]

So I think that's really the question, you know, and how are you investing your time? In things that do matter? You know, is there any time being invested in some of these things, in in terms of thinking about the culture of the transformational change that's necessary to pull off all of the detail that Carol showed shared earlier, but you could choose this, and you have to make that choice? Because it's not going to happen? Just through the process of, you know, life life moving on? As a matter of fact, it will go probably south on you. So, you know, what do you do now. So I think part of it is it's a daily task, it's really you have to incorporate this into your organization, and then be an active member in the growth in the wellness in the culture of your organization, I think a lot of us tend to, oh, that's somebody else's job. That's the HR department's job. But we have to all be involved. And we have to make sure that we have the Battlecry very clear, and everyone's on the same page. You know, again, you see, Blanchard's point here is that let's meet those expectations, and then exceed them using kind of the plussing mentality and be excited and energized. And be happy about the fact that you're going in a different direction. And you

have great hope for the future. And I think it's important that we we communicate that, and again, thinking about the idea of raving fans, and about what Blanchard teaches is that it's important for us to create that within our culture first, if you noticed earlier, when we talked about the different customers, you know, we had fellow associates as the top of the list, and then enjoy it, I mean, in celebrate, you know, once you've actually made some progress around those digital transformational things within your organization, because the journey is going to be long digital transformation is not a thing that happens, where it's like implementing an EHR, this is something that's going to take time, and there will be a ton of it in our industry, you know, in the coming years. So we have to set this on an environment where it becomes really super important. And I think, you know, the culture does matter. And you have to figure out how it is you're going to enjoy it. Just real quickly. You know, there's nine competencies, I think, when you think about, you know, the idea of how it is that you tied together what I've talked about, and what Carol, you know, elegantly talked about in terms of the detail that you have to really kind of use the techniques to support the idea of digital transformation. Project management plays a key role, the communication skills and making sure the organization has those, the you know, that training components that becomes really important in personalizing that, you know, understanding the kind of change management that your organization has to endure. It's in see through the financial budgeting skills. I mean, again, you know, if you're not a CFO, the fact is, is that we all have to understand the financial impacts and the financial expectations so that we can run those against that. You have to believe in it to obviously, to make that kind of investment ROI valuation, which Carol talked about as well. inspired leadership becomes critical, again with that zero tolerance of any negativity whatsoever. And again, the idea that culture doesn't matter. And I think, you know, as, as we lead organizations, this is what it's going to take to kind of make the next generation. And again, I, another book that I read many years ago that I think is also true for us. C level executives is that What Got You Here Won't Get You There. And I think that's more true today than ever before. So our success in the past really almost doesn't matter anymore. Because the industry is so different than it was 1020 years ago, even five years ago. So we're going to continue to see change accelerated at a level that we probably will be dizzy to some of us. So part of this is that how do you talk to your partners around this, and this is a kind of a great segue into Nick Cheswick, who's going to from qualitex is going to talk us through some of the things that they're working with in terms of thinking about some of the elements of digital transformation, and really kind of how is it that you know, what makes a great partner, you know, in owning your own processes and looking at how do you how do you look at vendors differently? You know, how do you allow time for customization? And how do you create those collaborations, and I think those become super critical. So what we want to do now is to take that 15 minute break. Remember to pick up a raffle ticket on your way out, because you could win a big prize. I'm told I'm not supposed to tell you what it is but it's definitely worth getting a raffle ticket for and Joyce next 15 minutes. So we'll be back here around 315 Snacks back. Yeah, you can bring snacks back in here.

Speaker 1 [1:31:32]

Wow. Come back and we'll pick up with filofax and

Unknown Speaker [1:31:37]

I have each one of your names so I know if you don't come back

Unknown Speaker [1:45:05]

Bla?

Unknown Speaker [1:48:58]

Yep, no problem. Yeah. Thank you. All right, here we go.

Speaker 2 [1:49:06]

Nicholas, thank you for for spending time with us and we're anxious to hear what you have to say.

Speaker 10 [1:49:11]

Thanks, Paul. Everyone, can you hear me? Okay. Awesome. I know it's been a long day of content. So in the final stretch here, thanks for the time, and thanks to our partners with open minds. So in case you didn't see the table out there, we're doing a bit of a raffle. Don't rush over there. Now. We'll give you a chance at the end if you haven't already filled out your form and then we're going to be given away a gift card. So yeah, today I'm going to be speaking about virtual care and interoperability. Some themes that I've learned over the past several years. So my name is Nicolas Cheswick. And I joined qualified tax last year after building your company called on call for seven years. And I also am working with with Colfax today on our AI strategy. So I've spent a lot of time working with behavioral health organizations on their telehealth client engagement and Portal strategy. Sorry, the slides are advancing automatically. But just some thoughts to preface this presentation here. First of all, clients deserve to be an active participant in their care journey. So it's really important to give them visibility into their progress, and a collaborative role in their own care, and start to think about as well, that clients can be a source of entering data into the system of record the EHR to not just your clinicians, through a patient portal, as well, it's really important to think about how virtual care can eliminate the barriers of distance between providers and their clients. And that's sort of what's happening today with telehealth, but in the future, thinking as well about how we can eliminate the barriers of time. So more asynchronous communication through a portal that will help with resource constraints from providers, and help patients as well with more convenience. And then finally, it's really important for behavioral health organizations when they approach virtual care to provide a modern patient experience. So a few years ago, when the pandemic hit, I think a lot of behavioral health organizations had to figure out their virtual care strategy basically overnight. And that's been referenced a few times today, we saw, you know, telehealth volumes, pretty much 10x overnight. And it was a difficult time, because in a lot of cases, like some other folks today said, maybe a multi year plan for rolling out client engagement got compressed into just a couple of weeks. And we you know, I think a lot of people thought after COVID, maybe telehealth volumes wouldn't, would go back to what they were pre COVID. But in behavioral health, I don't think that's really been the case. In fact, that volume is not only sustained, but it's actually grown in a lot of cases. And we've seen some businesses actually be able to have a purely virtual outpatient model, which I don't think was was very big pre COVID. And, as I mentioned, the workflow is often looked something like this, just a mixture of different point products hacked together, not integrated with the EHR, a very inconsistent client experience, a lot of different tools being used, and a ton of manual processes and tasks for your admin stuff. So that's kind of where we're at in a lot of cases, with agencies that I talked to today. And this is an example of just, you know, that list of tasks just to onboard a new client into a virtual care program, you're seeing like a lot of different things. This is from a

real, real client that we've worked with. So you know, a lot of pain points there. And I'm going to share throughout this presentation, some actual insights from a bain study that was conducted on about 100 behavioral health agencies across the US. And here's the first piece of data from that study, one, they looked at these agencies what they were spending on different tools. And what this shows on the left here is that many of them were using six to seven different tools to handle their patient engagement strategy. And each of those had a separate cost. So I don't know if everyone can relate to that. But that's what I see all the time. So this is another way to look at it. You know, just a ton of tip, a ton of different tools being used for each step in the client journey. On top of that, there's other problems. So I mentioned how these horizontal are kind of like point products that do one thing, don't cover the vast majority of the virtual care program workflow. But also, from a security perspective, your organization or a lot of organizations are actually shifting to become virtual first in some cases, where over half of their deployments are now virtual. And so if you think about it that way, your organization's now virtual first. It introduces a bunch of new security implications if your staff is working from home if clients are being able to act. Since your services for on their personal devices from anywhere, there's a lot more to consider. On top of that, support becomes a huge issue. If your telehealth and patient engagement volumes are increasing. The reason for that is that your clinicians will suddenly have to become experts in video call troubleshooting, which they definitely should not be having to do. And that's a huge pain point. You know, it can turn providers off of adopting a new solution, if you're trying to implement it, you know, they get stuck on a video call, that doesn't work. And then finally, this is also a big theme that I've noticed throughout the talks today as well is that there is huge market pressure from the Walmarts, the Amazons, the talkspace is the better helps these new direct to consumer players that are entering the market and attacking that mild to moderate symptom group of clients. And so how do you compete, having a brand and an online presence is extremely important in that if you're using disconnected tools that don't provide a consistent patient experience on the same level as those direct to consumer players, while you're going to be behind. So these are some big challenges in managing client engagement at scale. And just to share some more data here, so when organizations look at adopting client engagement, a lot of them are now thinking about adopting something that is telehealth plus engagement. So, you know, I think most people here probably, what I always see is that most organizations picked up something like zoom, or teams, or Doxie, at the beginning of the pandemic. And that really is just those are just video tools. And it doesn't have the whole engagement side of things. So now finally, a few years later, organizations are thinking about how do we combine those key features into a unified solution. And then also, EHR integration is obviously very important, too. I mean, if you have to double entry everything, every time, I mean, in my view, it's table stakes to have EHR integration. So and the data supports that a lot of these agencies are saying they wouldn't even consider a solution that isn't EHR integrated. I just want to talk a little bit more about that branding thing. So beyond just being competitive in the market, there's also a client trust aspect to this. It's really important to know that that your clients trust your agency, not a third party software solution, they know you they trust you. So having your brand on that experience. And having your brand throughout the client engagement journey is something that you should look for and something you should think about for that reason. Yeah. So I showed a few slides earlier, kind of the task list for for an organization that's using a bunch of products to manage their virtual care, Client Onboarding. This is what it looks like when you when you just combine telehealth and client engagement and portal into one solution, you immediately eliminate a ton of tasks and burden on staff. Yeah, so I mean, one of the agencies that that oncall work with, we help them consolidate from nine different software solutions down to one. And their telehealth volume has grown their provider volume has grown, they've actually been able to introduce new new group services that they haven't been able to before.

Speaker 10 [1:59:03]

One other benefit of this combining these types of things that I noticed is and we didn't expect is that it helps a lot with revenue and revenue around no shows and late cancellation fees. So I know not every agency can do that for every service. But when you can, having it built into your overall client engagement strategy is a great way to recover lost revenue from no shows a lot of agencies struggle to actually even charge for at all. And what we found is that about \$36 per provider per month can be recovered. If you start billing for no shows and late cancellations were appropriate. So something to think about. You have to do it in a tasteful way. You don't want your staff to have to be chasing people obviously, but building it into that client experience is something that can help you recover revenue from From lost, lost revenue from late cancellations in most shows, yeah, some other proof points and things that we've seen in the market just with not just on call, but just organizations that start to think about their client engagement and virtual care strategy as a single thing. Wrap up with a few few more slides here. For those organizations that are CCBHC s, in certain states, as I'm sure you know, it's becoming increasingly important to adopt a portal as a requirement. So, you know, thinking about a portal that also has telehealth and client engagement can be really valuable to your organization. Yeah, and just to wrap up, really, you know, obviously, many operational challenges stem from where we kicked off the growth of telehealth at the beginning of COVID. I think everyone would probably agree that it was a difficult time to throw together an IT strategy around this. And now everyone's kind of sticking their heads back up and figuring out okay, what now that this is going to be here, this way forever, as in clients accessing care remotely, you know, how is it part of our long term way that our organization is going to operate from a hybrid perspective. And virtual care should be viewed as a major growth opportunity. Telehealth volumes are growing, people that want to access care from the privacy and comfort of home, are now doing it for the first time on their on their mobile device, you can access that, you know, that customer base. So it can be a revenue, a revenue driver, a growth driver, an opportunity to build your online presence. And, you know, having this integrated with your EHR will be super helpful to to your overall workflow as well. That's all from me today. Thanks so much.

Speaker 10 [2:02:10]

Yeah, just curious, like, what are people seeing? Or is this resonate? Have you seen seen similar challenges with regards to client engagement and telehealth and, or any questions about you know about the insights or the data from this presentation?

Speaker 5 [2:02:30]

Thank you. Have you seen a difference in utilization between the mild and moderate patients versus those folks who are seriously mentally ill?

Speaker 10 [2:02:42]

You been on a telehealth the telehealth solution? Yeah, it's a great question. I think it's probably skews towards the mild to moderate. But I'd have to look more closely at that.

Unknown Speaker [2:03:01]

The others? Awesome, thank you. Well, Nicholas

Speaker 2 [2:03:08]

will be around. So if you have additional questions and want to dig into the detail, by all means. So thanks, appreciate it. Thank you. So just to try to, you know, put a wrap on what we've been talking about. So obviously, developing your roadmap for your organization, each one of your organization's will be different in some way, shape or form. There isn't a be all end all, you will have to dig into the detail because there are people involved. And I think we've we hammered home the ideas is that there's a lot of things that have to take place for a successful transformational inviter environment to to to occur. And I think, you know, certainly culture matters. A lot of the tenants of what Carol talked about and understanding, what are your expectations? What are your return on investments, for each one of these digital solutions, and then, again, to the point was made very early, this afternoon was fail thought fail fast. mean, if stuff doesn't work, not all digital solutions are just going to work out of the box, and they're gonna work exactly how you think they're going to work. The fact is, is that sometimes that change has to take place. I think Carol did spend quite a bit of time talking about that. Any additional?

Speaker 1 [2:04:35]

I was thinking about a couple of comments Nick made to and relative to some of the earlier comments. One thing about the you know, how do you take risk with implementing something the gentleman's question, you know, especially if your ROI is going to be pretty far out. And, you know, looking for partners who might be willing to join with you on a small scale. Maybe you can do something to fail. Fast internally on a small scale before you scale it. And if you can find a vendor partner that's willing to grow with you start something start with you know, your your opinion leader team, you know, who's willing to go with you on a risk internally, that that's a way to think about it. I really liked some of Nick's remarks around the integrated solution concept I was I was taking notes in terms of thinking about, Paul, your remark of having a battle cry, you know, and so thinking about if your Battle Cry is really going to be around creating an engaging work, work climate to retain staff, and what kind of efficiencies can you create for them? And then backing into so how do you do that either through your EHR partner, what are the other augmentative solutions that might be available through that that can you can reduce from nine to six, you know, different ways that people have to enter or communicate? Or really, those are sort of some of the dots I was connecting, listening to you and him as well? Yeah,

Speaker 2 [2:06:07]

very good. I think, you know, picking your champions is super critical in terms of really being able to move things forward, and to really accelerate that kind of change. But you know, what, open minds working with our clients a lot around strategic planning, financial sustainability, a lot of things that we talk about in terms of making this leap, really have to start with the strategy. It doesn't start with, let's develop an RFP, or let's go out to the marketplace and look for digital solutions. That's the wrong wrong approach. It has to start with what are your business needs? What is it you're trying to solve for? And then how does technology play a role in that, and by the way, if you don't even know the right answers, or the right questions, that's where a consultant can be helpful. I mean, I'm not saying that you have to outsource it.

But the fact is, is that you have to have those questions pragmatically in your organization to be able to get to a point where you can then go look for a partner, the right partner, and be very clear, and demonstrate the kinds of things that you need as an organization. And you may go out to the marketplace and find that it doesn't really exist. I mean, that's just the reality. But you'll find a vast majority of it would exist if you had the right ideas, and it is baked into your business strategy. So I think it's important to realize is that that business strategy, along with a financial strategy of what it is that your expectations are for your organization, are very, very crystal clear. And then you can develop what are the technologies that will support that, and taking the time to invest in understanding that and making sure that it is crystal clear, not only for you and your senior management team, but also to your board, and to your your staff members. Because, again, the idea of we're going a different direction has got to be really clear. It's got to be spelled out in the business strategy. And then it the technology that follows it has to make perfect sense, because guess what, if it's baked into the business strategy, and this is black and white, we got to do this, otherwise, others are going to take you know, the Nicholas's point is that, you know, you're gonna have competition perhaps from some of the retail players, where, you know, that may be okay or may not be okay. But you have to have the business strategy to understand whether in fact, that is impactful to your organization. And then what technologies are necessary to be able to kind of fulfill that to recur?

Speaker 1 [2:08:39]

is how many of you are observing or experiencing competition with out of industry competitors, like Dollar General or CVS and nobody else really experiencing Kroger, Kroger, you know, where mental health clinics, you would? I think, generally, you'd have to be in that what I would call traditional clinic space, you know, so many of you are probably specialty care, you know, you're working with, you know, more difficult populations doing non traditional services, but if you're in a clinic based service, and at all anybody seeing or maybe that's where you need a technology solution to tell you, if your referrals are lower, where are they headed, and where are they going? And are they going out into retail space? Anybody have an experience or seeing it? We certainly see it in the numbers in the news, but um,

Speaker 2 [2:09:35]

how many are you experiencing competition from the from the retail players in your markets? Anybody in here?

Unknown Speaker [2:09:43]

Where are you? Where are you located? Louisiana

Unknown Speaker [2:09:51]

farmer, Okay, makes sense.

Speaker 1 [2:09:54]

I forgot that I had the roving mic as well. So I gotta get up and roll around. All right, I'll switch.

Speaker 2 [2:10:09]

So, so let's just talk for a second, you know about the transitioning from, from the idea of needing a business strategy. And then having going to look for some of those technologies to how do you actually operationalize or, you know, turn that planning and execution to actually doing something. You know, I think, again, having making sure that you align your business priorities with it, strategies and visions, and I think the day is gone, when it is just one of those things, that's kind of a painful part of your operational process, it has to become strategic, if it's not in your organization today. And you, as a leader, have to also embrace it, and get the knowledge necessary to be able to lead with an understanding about how important that is. And again, the fact that you're in this seminar tells me a lot about who you are, because you're obviously very interested as a leader in this topic, and about making the kind of changes that Carol and I have been talking about, you know, in, you know, I think it's important also to be ready to do assessment, because, again, not everything's going to work perfectly, but understanding what it is that you're trying to achieve. Is it an increase in quality? Is it a direct ROI? Is it a soft ROI? Is it an improvement in customer satisfaction? Is it improvement in, you know, employee satisfaction of all of these? You know, is it part of your strategy, to retain staff, all of these things play a role in terms of your expectations, so setting those up, and understanding and doing gap analysis pre and post with the expectations and being able to look at it, it's so that you can course correct? If in fact, there are issues with whatever it is that you are trying to achieve. Or maybe the the assessment was incorrect in terms of what it is that you were ultimately the KPIs you were trying to hit. I think a lot of organizations kind of struggle with this, in terms of getting really specific. And again, the idea of failing fast is really more about making course corrections very quickly. So in other words, you don't necessarily always have to fail, but making the course corrections to see if in fact, you know, there are parts of the strategy that need to be fine tuned, become critical, especially when you're looking at many of these new digital solutions, which are again, you know, for the most part, in some cases, you know, unproven, and in some cases and very proven and others. You know, telehealth, obviously, is one that's been around for quite some time now. But again, there's improvements going on, and we should also raise our expectations about what that transformation looks like within the organization.

Speaker 1 [2:13:03]

Sure, Mike going here? Let me see. Yep. Yes. All right. So okay, good. But in that session, you know, there is if you look at Institute for Healthcare Improvement, they do a lot around how do you become an evolving healthcare system? And how do you continuously grow and change and learn. And the rule of thumb is those organizations that are really advancing themselves, they spend about 20% of their budget allocated for research, iteration, outcomes, you know, that's a big part of a budget. And so, you know, as you think about fail fast, you know, just thinking about being nimble enough, and financially secure enough to have some money set aside that you can continuously iterate. And even if it doesn't work, you can adapt and change. And I think it's kind of a good baseline for you to think about where you are from a business and financial side relative to how do you stretch yourself and not just do what you have to do, but how do you get there? And if you're not in that place, how do you find partners, collaborators? What does that mean for you strategically, you know, as you go, and the other thing I was thinking I was having this fall about? advice when I was a CEO at one point in time about as you're if you're trying to inform and educate your own self about how to actually lead a digital first organization. I mean, how do you even get it under you if it's not your sweet spot? And the advice I was given or read, and you might have seen it

too, is that read material that's outside of your comfort zone? Introduce yourself to things you would not ordinarily read. And so I was traveling a lot. So I always made sure I took material that was not something I would normally read, you know, whether it was sports, or a different political point of view or it information technology, you know, learn about things, or try to educate yourself get out of that comfort zone, and don't just say, Well, you go and do the research and come back and tell me, but kind of Steve, I'm reading a whole AI article right now, y'all might have seen in the Atlantic Monthly, quite long, probably getting a bow. I mean, if I had to give myself credit, I don't think I'm absorbing about 40% of it, you know, so I'm not absorbing all of it, and I'm having to dose it. But I mean, I'm learning a lot already. Even not getting it all completely. And so I think just as a leader, those are also ways to really think about how you lead organization is just continue to stretch your own self, you know, reach out of the box, you know, read material that you normally wouldn't take a look at go to a conference, yes, that you normally might not go to.

Speaker 2 [2:16:17]

Absolutely. And I think you know, I'm reasonably sure a majority of you read our executive briefing every day. And if you don't, you're missing one of the best opportunities, five minutes, probably of your time every day, will give you essentially, it's like having a research analyst like on your arm every day to serve you what you need to know. And again, I think if you look at the if you knowing what we invest in, to be able to make that happen. I mean, many of you think it's Monica sitting behind her computer, and she just kind of just flows out on paper that actually does occur way too often. But the reality is, is that there's a huge market research department within the company, that produces a lot of information. And that may or may not be, you know, we're not made to publish the entire thing, the research, but the reality is, is that we pick out, here's the implication of this. And here's why it's important. So those of you who are not signed up for the free fr EE executive briefing, that could be delivered to you, every single day, automatically, five minutes to bring you up to speed. That's huge. The other one, I'll say, Isn't that, you know, I read a ton. And I actually, you know, when I think I know everything about a topic, I usually then wake up in reality, the reality is, is that I don't know, because that was yesterday and today's different. But the that never happens. But the fact is, is that to Carol's point, read things that are uncomfortable. So if your thing is digital in it, and you focus on that, within our marketplace, read something that's technology related that's going on in banking, or automotive. It's amazing what you can learn, and look at the things that are happening over there, because you could figure out how to draw it through to some of the work that's going on here. So I think there's plenty of opportunity. And I love the idea of of reading things that are kind of off off the main mainline topic area,

Speaker 1 [2:18:13]

I think another tip with where to start is, you know, we've talked about, you know, determine, you know, figuring out what problems you're trying to solve, use some of these frameworks to do that, whether it's the domains or the quality lens, or other. And then I would say, once you sort of identify, here's the top three, you know, or maybe it's your battle cry, maybe here are the potential battle battle cries for 2024. I would encourage you to start with your current partners, whether it's your EHR partner or your other, maybe it's a financial management partner, or your fun out what is in their product roadmap, ask them, Where are you taking your product? One year out? Two years out, three years out, find out, you know, as Nick was showing, sort of we're qualified X is going, you know, because that's kind of what you were

seeing are some of the slides, find out what your where your partner is going? And how well does that match up with what you consider to be your next purchase or your next move and being a digital first. And maybe you set a target of saying we're going to do something in the digital first air area once every fiscal year, you set a target. And you say, Okay, which one's the first one? Start with your current partners? Those are the people that you know, assuming you have good partner relationship there and find out do they have something that is already in their bucket that you didn't know about or is coming, because you might be able to build on that? The reason I say that, and Paul can help me with the numbers. But when you look at some of the executive briefing and you read out in the space, it's 10s of 1000s solutions, right? And, um, you know, and it's not it's like 20,000 30,000. I mean, there's so much investment money, and so much startup and so many solutions, it's overwhelming to think about how you're going to get your hands around all of your options. And so, you know, think about what what do you know, first, and then reach out and kind of use your battle cry or your problem to start, you know, doing meta analyses of what you can find through your open minds, resources and others about solutions that you might want to get closer to have a demo for, find out a little bit more. And I say that with the caution of, you know, be clear, as you look at that, because just like every other industry, a lot of these solutions will fall to the wayside. Right, there's a lot of capital, everybody's trying to get started, some will make it some won't make it some will be acquired. And so you have to be sort of super careful in terms of the life of your partnership and to and in terms of who you join up with in that regard. So don't be naive, again, in terms of understanding who you eventually invest with and those solutions.

Speaker 2 [2:21:22]

Yeah, absolutely. And I think, using a forum like this, we are at a executive leadership retreat. Okay. When anybody says retreat, to me, it sounds like My cell phone's not gonna ring or I don't have to check the email. But that's just not the reality, right. But this is an opportunity to learn from people that truly are leading organizations in our industry, with the topics that Carol and I have been talking about. You all have practical examples. within your enterprise. We did the survey earlier, that I would say 50 plus percent are doing something along the lines of social media website, patient engagement, et cetera, et cetera, et cetera. But the reality is, is that many of us don't want we we think that we're so deficient, because we haven't figured it all out. Well, I have news for you. I know, I know, many of the people sitting in this room, they don't have it all figured out to be the first person to tell you, but they have figured out some things and some things that work incredibly well in your organization, and things that don't work so well. Or they found out the hard way. And it was hopefully not an overly expensive lesson, but some people have had expensive lessons. So this is an opportunity this week, really to kind of engage in those conversations. So just a quick exercise, Carol, indulge me here, we this was not planned. So I want everybody to just stand up with me, please, just humor me for a second. I want you to find somebody that you do not know Introduce yourself. And then and say I want to learn about what you guys are doing. So just find one person, make that connection. And then we're gonna stop one person

Speaker 2 [2:23:10]

I didn't say become best friends for the rest of your lives. There's the networking reception tonight. And you can carry on these conversations. Carol, one thing I found out about our audience today, there are a bunch of extroverts. This is a conference that is attracts extroverts. Alright, thank you guys. Everybody have a name everyone Ben met somebody. Good job. You guys are awesome. Thank you for

cooperating. So tonight at the reception I want you to find somebody just like this and ask because people want to share their story. People want to share their practical experience. People want to share with you what it is that they've done so that they can learn as well. Wow, this was this was a little more successful than I thought it was going to be Carol

Unknown Speaker [2:24:07]

we need a whistle You Can you whistle

Speaker 2 [2:24:13]

right all right. So let me let me put a wrap on this. Because I know you guys you guys are have now made a friend. So if you indulge me for another minute I'll let you be even closer friends with your new friend. All right. All right. I'm gonna keep Carol I think they want to stay here until eight o'clock tonight.

Speaker 1 [2:24:46]

I don't know if you've heard Paul. But we're gonna wrap up and we're gonna do the raffle full. Yes. You have theirs. This is actually what our retreat is all about. It is all about this showed us and I hope we have it on tape and couldn't put it out on social media. Yeah. Because there is a reception tonight. If you're not aware, there's a wonderful reception tomorrow night at the Gettysburg Museum, it's for two hours, there's food and drink. And if you're going on the leadership tours, I think starting tomorrow afternoon, another great, I've been on them, yep, you go over on the bus, you have a great opportunity to connect. So whoever you connected with here, be sure and find them at one of those networking opportunities. And certainly find another person or to to network with as well, you've got lots of opportunity. So thank you for demonstrating the value of the recruit.

Speaker 2 [2:25:36]

Absolutely. So just to put a wrap on this. And I think, Carol, thank you for the wisdom that you've shared with us today. And I think, just to kind of talk in summary here, you know, you have to align the concepts of what we talked about with your strategic plan, and it has to become foundational to what it is that you're doing. The technology investments that you make, should not just be we have to have one of these, it should be this is important for our success. And if it doesn't fall in line with that. And if you don't have if your management team doesn't have the mindset of saying, Okay, here's a business opportunity, here's a business problem into think very first out of the box, how do we solve with this? With, with technology? Can we even answer the question? Do we even know the answer, that's where you have to start with. And I think that mindset becomes very different than, we have to buy one of those because it's required, it's to be compliant. So I think it's important that we look at that, and then figure out how you're going to measure it, you know, look at those investments and making sure that they have the kind of investments in your key performance indicators within your organization and you measure, you know, things that impact patients in clinical staff in your administration, your obviously your financial, the financial implications, you know, look at your competition across the marketplace, look at some of the potential changes that are going on, meet some of you may look at different service lines, or realize that you have to close certain service lines and open others, or change how you is you're delivering one of your

services, all of those are in play here. But if you're going to make those changes, figure out how you're going to use technology to potentially make the change, make the pivot, because I promise you, especially some of these retail competitors that are ridiculously tech savvy, are going to bring that to bear and be able to do it with a lot less expense involved. So that's important, and realize that what it is that you're great at most of you are probably fantastic. At high acuity populations, I'm just guessing. And you know what the lower acuity populations are more of a commodity. And that's what a lot of the retail players are initially targeting here. So, you know, it's important for you to understand within the bounds of your market, what it is that you're trying to do, and I think it's important you embed, you know, obviously, your the culture becomes important, but the idea that we have to continuously innovate in today's market really becomes a crucial to success. And I would dare say that, in some cases, some markets, especially larger markets, it becomes a catalyst for whether you fail completely as an organization, there are more failures, I think today and those in the coming year or two, we see there's a lot of risk involved in our marketplace. But there's also a lot of opportunity. I mean, I don't think in my since I've been involved in in health care market, I'd have never seen opportunity, like it would exist today. And I think, you know, the awareness of the impact that mental health and IDD services have on populations, a population health is never been this profound. So that's a tremendous opportunity. I know there's payer implications involved. But again, part of this is you have to figure out positioning wise, and using technology as part of that, and in how it is that you're going to make those investments. And in making it an annual endeavor where you're looking at it, it's not something I mean, you know, the idea of doing a five year strategic plan is, is sometimes important. But you know, we see more organizations should compressing that timeframe now than ever before. During COVID, we were doing 90 Day strategic plans for organizations. Today, I would say honestly, especially around technology is something you should be looking at at least annually. You know, not much longer than that, because the markets changing. And the technologies that are available are changing, and their positioning is changing. So again, there's been a lot of investment in a lot of failure and technology, see companies that were they you know, had in excess of over a billion dollars invested them. You know, we saw a couple of companies one, what went for sale and bankruptcy for \$65,000 for the assets. So, you know, the fact is, is that there will be a lot of successes and a lot of failures. But you know, figuring out where your organization fits and what is the types of technology that you should be investing in really becomes important in terms of your long term growth and your long term sustainability in your organization's success. I think the other one in in I think this is important in terms of, you know, impacting culture is the idea of how it is you're going to implement these, these new technologies and getting the right formula, the right champions on board, figuring out what what needs to change within your culture, how it is that you're going to create that battlecry. What is it the metaphor you're going to use? How it is that you're going to, you know, do you have the right leaders to really make that happen? Or do you need additional leaders or different leaders, all of those are the kinds of things that are challenging organizations today. And again, the idea of what I said earlier is the the book that was written probably 15 years ago is so true is like, what got you here won't get you there. And that's a very true today. I mean, we have as a consulting organization, as a market intelligence organization, we have a lot of opinions, because we do a lot of we spend a lot of money and we actually invest in a lot of research that we're doing to try to predict some some of these trends for our clients. But the fact is, is that you need to be as confident within your own organization, about what some of those trends look like and what impacts they have across your enterprise because again, your enterprise will have to change. I think Carol, unless you have anything else I think our audience has, they've made new friends with their will hopefully they've been entertained. And hopefully they've had fun and we're happy to take any questions that you might have

Speaker 1 [2:31:30]

let's do questions. See if there's any questions or comments

Speaker 2 [2:31:35]

or you may just be so like tired of listening to us that you just looking forward to escaping and actually most of you're looking forward to winning something from our partner qualify next that's probably Yeah

Speaker 1 [2:31:50]

well we and we of course will be at the receptions as well and we'll be around so just find us if you have anything you want to follow up on absolutely absolutely appreciate your not only your attendance but your attentiveness and appreciation participation.

Unknown Speaker [2:32:06]

So who wants to win something? Anybody

Unknown Speaker [2:32:08]

Okay, here we go wow Paul's gonna do the honors.

Unknown Speaker [2:32:18]

Ali, are you excited for this group?

Speaker 9 [2:32:21]

I am I'm gonna let Paul do the honors though so no one comes up to me afterwards and says they should have won and I

Speaker 2 [2:32:27]

then they're gone person they're gonna blame me because they yeah so that's all pretty smart All right, we go

Unknown Speaker [2:32:35]

all right lucky winner sir they're all mixed up

Unknown Speaker [2:32:38]

all right. Picking one I think I picked yours first name is female it's a female name make everyone stand up and then they just sit down as if if your first name is Heather stand up

Speaker 2 [2:33:07]

ally Guess what? So again Heather brindle is not here want while other this anybody know Heather brindle from youth advocate programs Inc. You should find her and tell her that she just lost out all right. This again is a female how many Allison's do we have in the room? We are Ellie,

Unknown Speaker [2:33:48]

your chances are getting better. Wow.

Speaker 2 [2:33:51]

Holy cow. All right. Alison Hutchinson from Hartman executive advisors.

Unknown Speaker [2:33:57]

Wow

Unknown Speaker 2:34:03

watch them

Speaker 2 [2:34:10]

if you are from Victor community support services in California, oh stand up if you are from this organization state so so what is your what is your the first letter of your first name? Hey, Ali, we need to we need to check IDs clearly. This is a dishonest audience here

Unknown Speaker [2:34:45]

you think that Lorraine is not here? How did you know I picked her card? I didn't put Oh, well. i i I, audience, what do you think? Yay, congratulations. Listen, thank you all for coming. Thank you for quality to Carfax for supporting this. We really appreciate it.

Unknown Speaker [2:35:14]

Thank you everyone.

Speaker 2 [2:35:15]

Yes and thank you very much. You all enjoy the rest of the event. If you have any questions or anything Carol and I can help you with or ally, besides giving you a prize, please come up. Thank you