Three Steps to Data-Driven Learning

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Noelle works with cross-functional teams in multiple DRG offices to create and deliver impactful learning content for clients across the country. For over a decade, Noelle has helped clients optimize revenue cycle functionality through onsite consulting, qualitative analysis, denials analysis, face-to-face and virtual training engagements, comprehensive payment review, and underpayment recovery.

Currently, she is responsible for developing and delivering impactful learning content, both virtual and instructor-led, that helps organizations implement new strategies, procedures, and revenue cycle improvement initiatives. Noelle is Certified as a Revenue Cycle Leader.

Recent Engagements:
• Face-to-Face Point-of-Service Collections Best Practice Training for 100 staff
• Face-to-Face Customer Service Training for 850 staff
• Strategic Curriculum Development

Upcoming Speaking Engagements and Events:
• HFMA Tunica January 30–February 2
OUTLINE

1. Who is Healthcare Business Insights?
2. The Learning Landscape
3. What is Data-Driven Learning?
4. Three Steps to Data-Driven Learning
5. Case Studies
6. Recap
7. Q&A
We exist to help organizations better understand, measure, and improve the end-to-end patient experience.
HBI Helps Healthcare Organizations Optimize Performance, Engage & Retain Staff, & Understand the Market

SERVICES & ANALYTICS
- Operational Assessments
- RC Optimization Analysis
- Process Improvement Analytics
- Denial Intelligence Analytics
- Account Diagnostics
- Real World Data Analytics
- Patient Flow Analytics

LEARNING
- Face-to-Face Workshops
- 130 + RC E-Learning Courses
- Pre-Hire Assessments
- Strategic Curriculum Development
- Competency Assessments
- Custom E-Learning Development
- Learner Analytics
- Interactive PDFs

RESEARCH
- Market Overviews
- Revenue Cycle Best Practices
- Cost & Quality Best Practices
- Revenue Cycle Benchmarking
- Networking Events
- Webinars
A Community That Stands Behind You

50 States

2,000+ Hospitals

50K+ Professionals Served

20 of 30 US Largest Not-for-Profits Health Systems Served

NET PROMOTER SCORE
ABOVE ALL THE REST

80.6

The score above is sourced by surveying the HBI Provider Community.
The Learning Landscape
Enough about me. Let’s hear from you!

What are your biggest challenges to implementing training for your staff?
Per LinkedIn Learning Report 2019…

Top Focus Areas for Talent Developers

#1 Identify, Assess, & Close Skill Gaps

#2 Increase engagement with learning programs

#3 Develop Career Frameworks

↑ 32% year over year
Per LinkedIn Learning Report 2019…

“Limited budget” for training is no longer the top roadblock reported by talent developers.

- **% of respondents expecting budget increase**
  - 2017: 27%
  - 2018: 35%
  - 2019: 43%

- **% of respondents reporting significant budget challenge**
  - 2017: 49%
  - 2018: 32%
  - 2019: 27%
Staff are hungry for learning. But I see 2 hurdles that remain:

“I’m worried that if I train them they’ll leave my department.”

“I can’t convince my CFO of the return on the investment.”
Let’s just get that first one out of the way.

“I’m worried that if I train them they’ll leave my department.”
Let’s just get that first one out of the way.

"What if I train them and they leave?"
"What if you don't and they stay?"
- W. Edwards Deming

“Train people well enough so they can leave. Treat them well enough so they don’t want to.”
- Richard Branson
"I can’t convince my CFO of the ROI."

"It’s not a great mission statement, but we’ll revise it if things get better."
We can’t afford to NOT train.
Attrition and Disengagement is EXPENSIVE.

**Cost of Attrition (SHRM):**
- Leader-Level: 250%
- Entry-Level: 50%

**Disengagement Rate:** 17.2%
- 40 Staff on Team x 17.2% = 6.88 Disengaged Staff

**Cost of Disengagement:**
- 34% x Annual Salary
  - $45K Annual Salary x 34% = $15,300 in decreased productivity, tardiness, and missed days

**Cost of Team Disengagement:**
- 6.88 Staff x $15,300 = $105,264 / year

**Cost of Disengagement (Gallup):**
- 17.2%

**Example Calculation:**
- 40 Staff on Team x 17.2% = 6.88 Disengaged Staff
- $45K Annual Salary x 34% = $15,300 in decreased productivity, tardiness, and missed days
- 6.88 Staff x $15,300 = $105,264 / year
What is Data-Driven Learning?
A Theoretical Framework for Data-Driven Decision Making

Ellen B. Mandinach, Margaret Honey, and Daniel Light
EDC Center for Children and Technology
2006

**Data**
- Exist in a raw state
- Do not have meaning in and of itself, and therefore, can exist in any form, usable or not.
- Whether or not data become information depends on the understanding of the person looking at the data.

**Information**
- Data that is given meaning when connected to a context
- Used to comprehend and organize our environment, unveiling an understanding of relations between data and context.
- Alone it does not carry any implications for future action.

**Knowledge**
- The collection of information deemed useful, and eventually used to guide action
- Created through a sequential process.
A Theoretical Framework for Data-Driven Decision Making

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What is Data-Driven Learning?

Tailored education that addresses the needs of teams in order to accomplish a defined business objective.

**In Schools:**
- Improve Standardized Test Scores
- Reduce Dropout Rate

**In Healthcare Revenue Cycle:**
- Decrease Denials
- Decrease A/R
- Increase Cash Collections
- Reduce Cost-to-Collect
- Reduce Time to Bill
- Improve Patient Satisfaction
- Improve Staff Engagement
Why is it important?

1. Because training for training’s sake is a waste of resources

2. Because we can’t build programs that engage and grow staff without understanding what actually engages and grows them

3. Because we can’t truly improve processes or achieve strategic business objectives without measuring progress and tending to specific, identified gaps
So why is this simple idea so hard to implement?

I want my team to learn to learn how to do THIS.

But I don’t care about that, I want them to focus on something else.

Neither of those matter, I can’t afford to take staff off the floor for training until we hit our numbers.
Three Steps to Data-Driven Learning
HBI’s Approach to Data-Driven Learning

**ASSESS**
Prioritize results of data analysis to drive the decision-making by:
- Defining the reason for training
- Defining the Measurable Business Objective
- Identifying the critical transformational opportunities
- Getting to know your staff

**CREATE**
- Align competency deficiencies to business opportunity
- Build learning objectives that will move the right needle
- Build and deliver tailored education

**MEASURE**
- Adjust content and delivery as necessary in response to staff feedback
- Compare metrics to original data
- Assess and iterate often for course correction
- Deliver “drips” of information to encourage continued learning
ASSESS: Define the Reason for Training

Why do we want to train?

• Improve Career Development
• Reduce Attrition
• Improve Staff Satisfaction
• Improve Business Performance
• CFO isn’t so pleased with spreadsheets
• Reduce Denials
• Improve Patient Satisfaction

BE HONEST!
ASSESS: Define the Reason for Training

Validate the hunch with data analysis

**Quantitative:**
- Denials Analysis via 835s
- Collections Totals
- Productivity Measures
- Call Abandonment Rates
- A/R Days
- DNFB
- ATB Auditing

**Qualitative:**
- Staff Needs Surveys
- Staff Engagement Surveys
- Staff Interviews
- Job Shadowing
- Non-clinical Patient Satisfaction Surveys
- HCAHPS
1 ASSESS: Define the Measurable Business Objective

Prioritize the information gleaned from data to determine where to spend time training. Use that data as baseline of MBO.

What needle are we trying to move?
How are we currently measuring it?
How do we move it?
How far do we need to move it?
ASSESS: Define the critical transformational opportunities

Who should we involve and what do they know?

I can’t

Test

I won’t
ASSESS: Get to Know Your Staff

"Always learn your employees’ strengths and weaknesses,
so you can take advantage of them."

1
1 ASSESS: Get to Know Your Staff

How do your staff prefer to learn?

https://www.healthcarebusinessinsights.com/learning-style-inventory/

https://www.healthcarebusinessinsights.com/multiple-intelligences-inventory/
CREATE: Use the Data to Develop Tailored Education

“I Can’t” Aptitude Deficiency

- Web courses
- E-modules
- How-To Technical Training
- Procedural/Process-Flow Training
- Click Paths
- PDFs

“I Won’t” Attitude Deficiency

- Face-to-Face Workshops
- One-on-One
- Job Shadowing
- Scenario Analysis
- Group Discussion
- Coaching
3. MEASURE: Adjust as Necessary & Keep it Coming

How clear was the presentation of information?

- Extremely Clear: 71.01%
- Very Clear: 25.68%
- Somewhat Clear: 3.11%
- Not Clear: 0.19%
- Not at all Clear: 0.0%

How do you feel about the amount of information presented?

- Much Too Little: 2.92%
- Somewhat Too Little: 6.81%
- About the Right Amount: 87.55%
- Somewhat Too Much: 1.36%
- Much Too Much Information: 1.36%

How engaging was your instructor?

- Extremely Engaging: 75.29%
- Very Engaging: 22.76%
- Somewhat Engaging: 1.95%
- Not so Engaging: 0.0%
- Not at all Engaging: 0.0%
MEASURE: Adjust as Necessary & Keep it Coming
3 MEASURE: Keep it coming with “drips” of information
HBI’s Approach to Data-Driven Learning

1. ASSESS
   Prioritize results of data analysis to drive the decision-making by:
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FEEDBACK
Results

The Right Training

For the Right People

At the Right Time
Engaged Staff
Results

From “I can’t” or “I won’t”
To “I can” and “I will”
Results

Improved Performance
Happy Leadership
Satisfied and Loyal Patients
Better care for all.
And that’s the point.
Case Study: Point-of-Service Collections Training
ASSESS: Define the Reason, MBO, and Opportunities

Data Collection & Root-Cause Analysis:

Quantitative:
- Front-End Collections
- 2016 Total POSC = $1.3M, 0.27% of NPR
- National Average = 1.2% of NPR

Qualitative:
- Staff Survey Results
  - Didn’t feel comfortable asking
  - Didn’t understand Deductible, Coinsurance, Copay
  - Didn’t ask
  - Nervous about launch of Service Deferral Policy

How comfortable are you asking for payment up front?

How comfortable are you explaining healthcare finance to patients?
1. ASSESS: Define the Reason, MBO, and Opportunities

**Turn Data to Information to Knowledge**

The lack of staff financial literacy and general feelings of discomfort with asking for payment is impacting the ability of the organization to collect at point-of-service.

**Define Reason For Training**

1. Building staff knowledge and confidence so they actually ask
2. Teaching staff the new Service Deferral Policy

**Define Measurable Business Objective**

1. Increase Front-End Collections by 100%
   Soft skill training could also improve soft measures like Staff Satisfaction/Engagement, but we didn’t measure those at the time

**Map Competency Deficiencies to the Business Opportunity:**

“I Can’t” vs “I Won’t”

- Shadowing and Survey revealed the issue was not related to tech/procedures
- The MBO will move if we:
  1. Increase Staff Confidence
  2. Increase Staff Healthcare Financial Literacy
CREATE: Build and Deliver Tailored Learning

Learning targeted both “I Can’t” and “I Won’t”:

• Face-to-Face Workshop for Front-end Staff
• Scenario Analysis
• Group Discussion
• Leave-behind Job Aids
• Workbook
• Custom Web Courses on policy & procedures
CREATE: Build and Deliver Tailored Learning

Competency gaps drove content creation:
• Needed RC understanding – Why we collect
• Needed scenario practice – How to collect

Adult Learning Principles and Staff Learning Styles drove development of activities:
• Puzzle
• Poll Everywhere
• Small Group Script Improvisation

Module 1: The Big Picture
Setting the Stage for Point-of-Service Collections

Learning Objectives:
• Identify the different functional areas of the revenue cycle
• Explain the core concepts of point of service collections
• Outline the benefits of collecting before service is received

Module 2: Effective Conversations
Scenario + Role Play Activities

Learning Objectives:
• Explain the benefits of collecting before service is received
• Develop strategies to improve communication with patients
• Demonstrate the ability to successfully implement a point of service collections conversation
MEASURE: Adjust as Necessary & Keep it Coming

A. Collect Feedback
   - Adjusted delivery style and targeted discussion questions as necessary
   - Updated final Facilitator Guide to reflect changes based on feedback so it was as robust and targeted as possible for future trainings

B. Post-Workshop Observations
   - Conducted Observation Analysis 4 weeks post workshop to get qualitative data
     - How were staff feeling?
     - Were they asking?
     - How were they asking?
     - What lingering questions did they have?

C. Check MBO – Increase POSC by 100% within 1 year
   - Monitor collections monthly to see if on track to meet goal

D. Respond to dips in progress with timely “drips” of information
   - Launch 3 web courses
   - Deliver PDFs with main learning objectives from Workshop each quarter
   - Deliver short articles highlighting success of other orgs going similar things
   - Infuse discussion questions in team meetings
   - Review progress and celebrate team/individual successes monthly/quarterly
Results: Client increased POSC by 369% ($3.5M) within one year of HBI’s learning workshop!

<table>
<thead>
<tr>
<th>Year</th>
<th>ANNUAL POS COLLECTIONS</th>
<th>% of NPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$1.3M</td>
<td>0.27%</td>
</tr>
<tr>
<td>2017</td>
<td>$4.8M</td>
<td>0.98%</td>
</tr>
<tr>
<td>2018</td>
<td>&gt;$6M</td>
<td>1.23%</td>
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</tbody>
</table>
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FEEDBACK
The Right Training For the Right People At the Right Time
QUESTIONS?

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