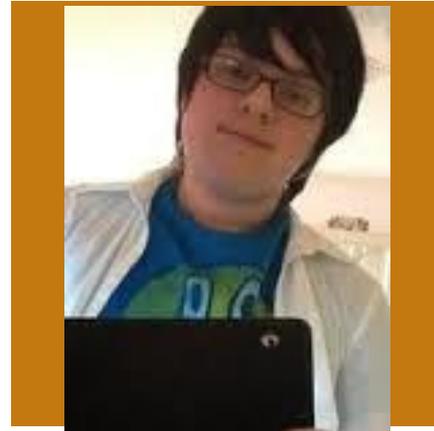


***The Right People***



**Place the Right People on  
the Bus in the Right Seats**

**LEDGEROCK**  
CONSULTING

**Veronica Fogelman  
President & Founder**

# The Future of IL/AL/PC/SNF/Home Care

## What do we know?

- Our healthcare industry is changing; our clients are changing.
- Buy-outs, mergers and take-overs are the norm.
- The last three years have been challenging with declining snf occupancy: 2015, 2016 and 2017; 2018 will continue this trend.
- The senior population is shifting and will continue to shift away from skilled care.
- Medicare and Medicaid rising costs and declining reimbursements
- Home care and senior living options are often first choice.

# What can we expect?

- The 75+ group will provide a slight referral increase in 2019.
- We will see a slight occupancy increase in 2019.
- Silver Tsunami, we have been waiting for will not hit until mid 2020's.
- As the 80+ group ages, the 75-81 population will increase.
- They will require healthcare but will be in search of a different delivery.
- The concept of Independent Living is no longer synonymous with nursing home.

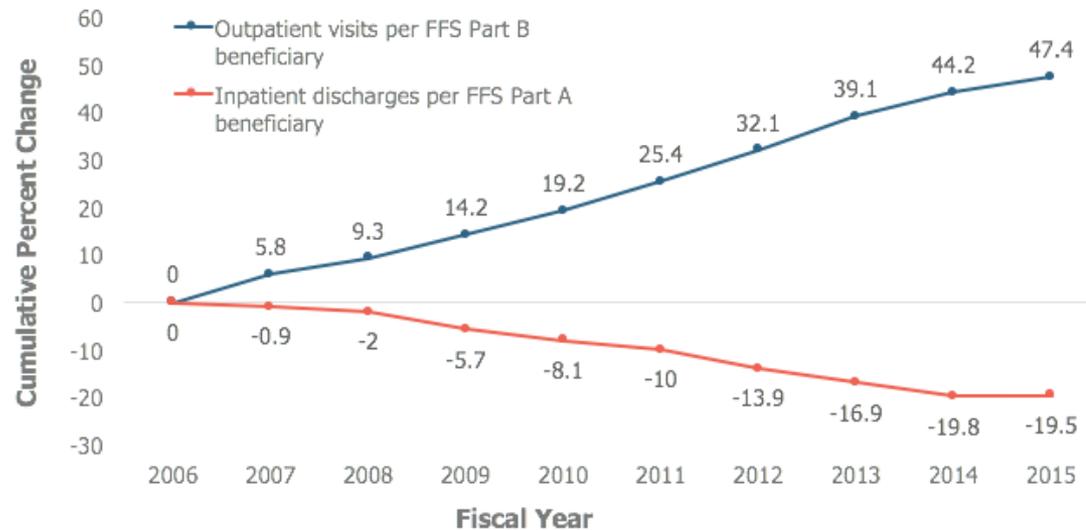
# What are they in search of ?

- In a recent study, 30% ranked IL/AL as extremely desirable.
- In the same study, 56% ranked IL/AL as very desirable.
- They appear to clearly differentiate them from a snf.
- Clients will be in search of neighbor-friendly co-op living communities.
- They want to age in place and enjoy high-end lifestyle amenities.
- Home care and an environment that serves as a care management hub will be essential.

# What can we expect?

## Massive Shift from Inpatient to Outpatient

*Outpatient visits are up*



ANNE TUMLINSON  
INNOVATIONS

Source: MedPAC March 2017 Report to the Congress: Medicare Payment Policy,  
[http://www.medpac.gov/docs/default-source/reports/mar17\\_medpac\\_ch3.pdf?sfvrsn=0](http://www.medpac.gov/docs/default-source/reports/mar17_medpac_ch3.pdf?sfvrsn=0)

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# What should we consider?

“Organizations not adapting and changing aren’t going to be around in 5-10 years.” Josh Bagley of Goodwin House Inc.

- Create service delivery and care management hubs.
- Hire talented technicians to provide advanced metrics.
- Become key partners with risk-bearing organizations.
- “You may even,” Anne Tumlinson, “partner with a managed care organization.”
- Maintain an environmental market analysis to assist with planning and speculation.
- Identify marketing opportunities to identify appropriate customers to manage through the entire healthcare process.

# Workplace Challenges

Stalled Revenues

Slipping Performance

Wrong Hires Over and Over

High Turnover

Superstar Employees Leave

Leadership Burnout

Unhappy Employees

Low Level of Employee Engagement

Lack of Energy, Innovation, Creativity

# Statistical Support

According to a Jobvite study, 56 percent of the 1,404 recruiting and human resources professionals surveyed said that a lack of communication and personal skills acted as a major block in the job market.

According to The Harvard Business Review, the average annual turnover in sales is 25 to 30%. This means that the equivalent of the entire sales organization must be hired and trained every four years or so, and that's expensive.



# Finding the Right People

## ■ Some Results

- Increased inquiry to tour rate by 55%.
- Increased tour to sales rate by 90 %.
- Increased IL waiting list by hundreds.
- External marketing was determined to be significantly more productive when the right person is in the role.

## ■ The Why

- Cost
- Turnover
- Stagnant Revenue

## ■ The How

- Understand the role requirements.
- Be aware of the culture.
- Outline the requirements for success.

**Job/Career Success is related to two general factors:**

## **Intrinsic Success**

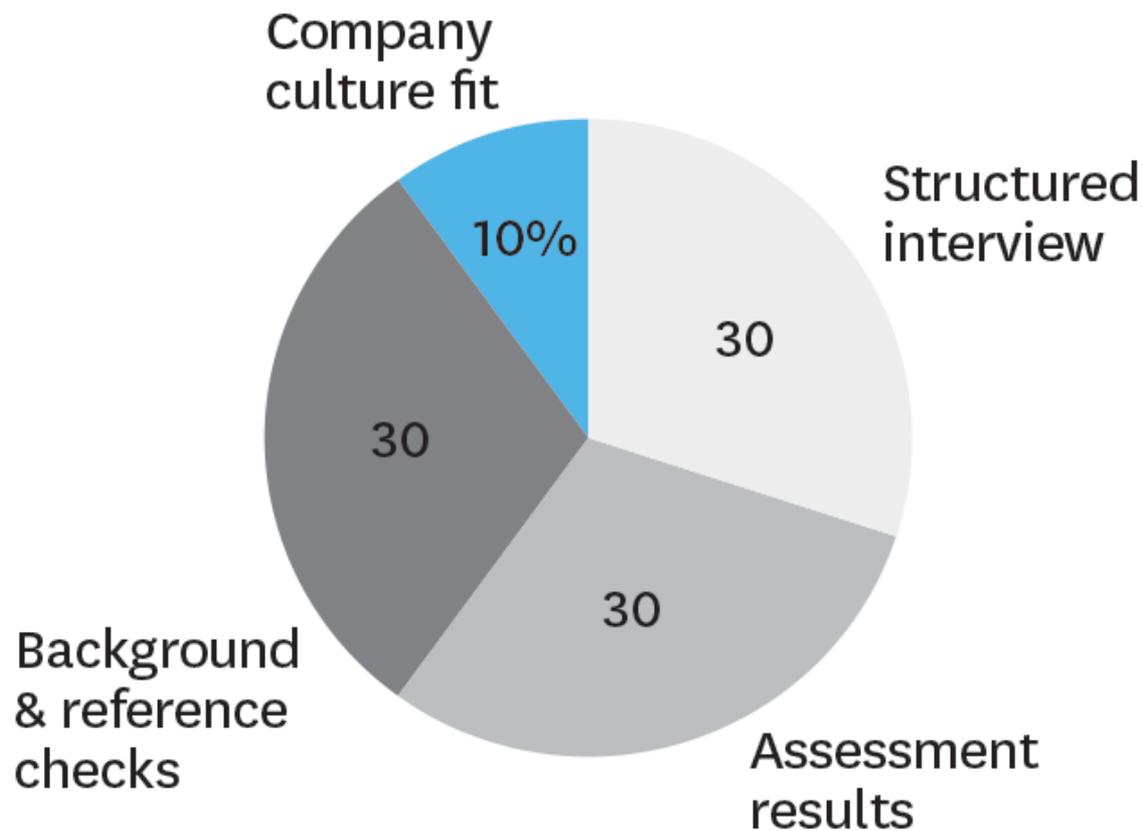
job satisfaction

## **Extrinsic Success**

compensation and status

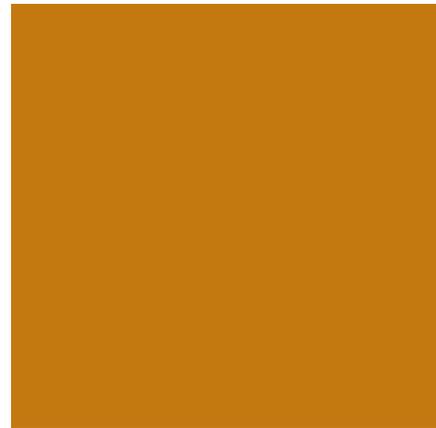
# How to Evaluate a Job Candidate for a Sales Position

Focus less on how a candidate fits into the company culture.



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# Know the position



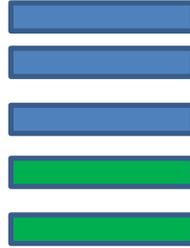
## RULE # 1

If the job could speak what skills, behaviors and values would it tell you the right person would possess to be a success?

## Personal Skills

- Results Orientation
- Resiliency
- Leading Others
- Diplomacy & Tact
- Conceptual Thinking

## Benchmark



## Applicant



## Values

- Theoretical
- Political
- Regulatory

## Benchmark



## Applicant



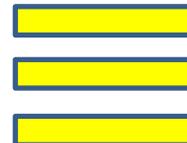
## Behaviors

- Analysis of Data
- Sense of Urgency
- Competition

## Benchmark



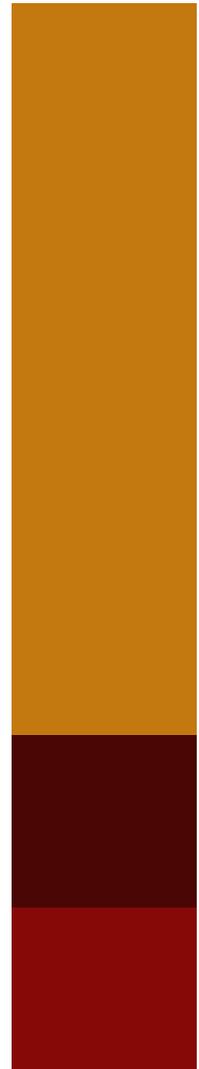
## Applicant



Very Important  
Important  
Somewhat  
Not Important



Strong Compatibility  
Good Compatibility  
Fair Compatibility  
Poor Compatibility



# Use an Assessment Tool



## Rule # 2

Rely heavily on the results to match the skills and values with the job benchmark.

# Assessment Review

## ■ Values

- It is the “Why”
- Most important valuation
- Rarely Change
- What gets you up each day
- All life’s decisions are based on your values
- It is the “Why” you make the choices you make

## ■ Behaviors

- It is the “How”
- Your style of work
- The environment you prefer
- The management style you prefer

## ■ Personal Skills

- This is the “Will “
- These are the most easily changed
- These are the skills that are either valued or not in the current role.

# How the *Assessment System* helps you work with each profile?

## **Director/Persuader**

- High Energy
- Flashy
- Walks fast/talks with hands
- Quick decision maker
- Take Charge attitude
- Taps toes and fingers

## **Protector/Checker**

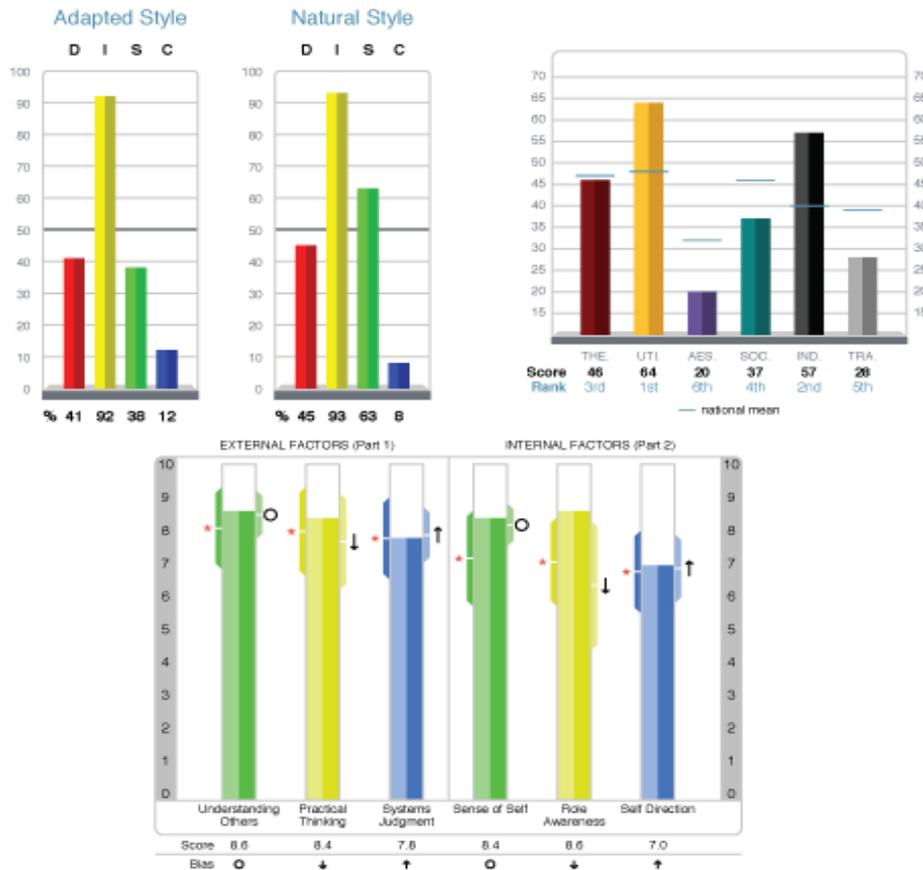
- Low Energy
- Controlled
- Maintains a consistent pace/routine
- Requires facts to decide
- Manages emotion with cool demeanor

# Intense and Complex

The reaction is most often surprise at how closely the results depict a persons profile  
Everyone is a mixture of many values, behaviors and skills.

## DPCC

Four profiles – Director, Persuader, Protector, Checker  
Each has distinct characteristics



It should be  
only 30 % of  
the decision



## Rule # 3

The resume', experience and interview process are equally important. They are all tools in your hiring tool box.

# The Interview

## ■ Step One-Interview

- Interview 5-10 candidates
- Narrow it down to 2 or 3
- Base your choice on the experience that matches the job benchmark.

## ■ Step Three- Be Quiet

- Conduct a final interview with a focus on areas of concern in the assessment.
- Have several team members sit in or do their own interview.
- Be quiet and ask questions

## ■ Step Two - Assess

- Ask best candidates to take the assessment
- Review it based on the match to the job
- Identify with the team any concerns
- Schedule a second interview for the final 1 or 2 selected.

## ■ Step Four- Share the Risk

- Hold a team review and discuss the behavior strengths and weakness
- Discuss the motivators to determine if this candidate will be valued in this role.

# Benefits of any Assessment

## ■ As a hiring tool

- Prevent turnover
- Reduce revenue lost to replacing sales people
- Reduce cost of lost sales
- Increase effectiveness of the sales person

## ■ As a personal development tool

- Provides the unique opportunity to understand your own values and profile
- Learn how and why you interact in a certain way
- Use this information to improve your management style.

## ■ As a management tool

- Understand how the employee reacts to management
- Understand why they react the way they do
- Design development plans based on their profile

## ■ As a team building tool

- Teams are made up of many differing profiles
- Understanding each other makes team building work
- Improves work effectiveness and efficiency

# Benchmarked Position

## External Sales and Marketing

Values	Behaviors	Skills	Profile	Experience
Economic	Sense of Urgency	Frequent Interaction w/ others	Persuader	3+ years sales
Theoretical	Competitive	Teamwork	Director	Healthcare
	Resilient	Interpersonal skills		
	Personal Accountability			

# Which candidate is the best?

## Candidate One

High Director  
Low Personal Accountability  
Low Collaboration  
High Value- Economic

## Candidate Two

High Persuader  
Low Resiliency  
Low Analytics  
High Value- Independence

- Both Candidates
  - Strong Resume'
  - 3+ years of experience
  - Likeable Interview
  - Both in healthcare
  - Excellent references

## Recap...

- Take your time; hire the right person...the first time.
- Understand the position and what it takes to succeed and to feel valued.
- Use a three-prong approach: experience, assessment and a smart interview.
- Share the risk
- Interview is about them...be quiet
- Trust the tools
- Manage by understanding your profile as well as theirs.

## Recap

- Teams are or should be comprised of many profiles, varied behavior styles and mixed attributes.
- The strong leader knows all of the team strengths and manages to their differences.
- The successful leader understands their own profile and their weakest attributes.



## **2nd Thursday Summer Breakfast Series**

Open invitation to  
healthcare sales and  
operations  
professionals

## **Summer Breakfast Series**

Join us for early morning continental  
breakfast

7:00-9:30 am

**FREE** learning experience for  
discussion on timely healthcare topics  
such as **hiring, sales, marketing plans,**  
**team development, workplace stress ,**  
**lead management, hospital partnerships**  
**and others**

### **Summer Breakfast Series**

Locations to be announced

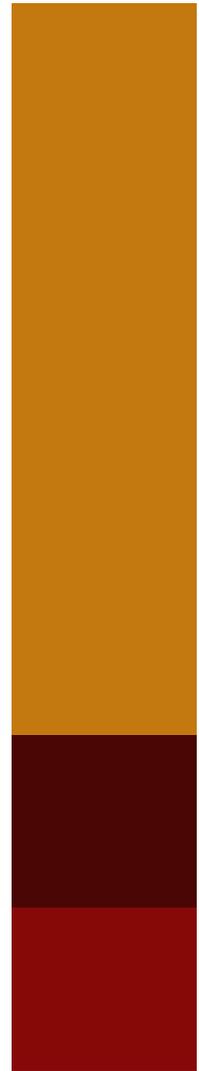
Harrisburg, York, Lancaster, Reading,  
Allentown and Philadelphia

For detailed content and reminders  
contact [roni@ledgerocksolutions.com](mailto:roni@ledgerocksolutions.com) or  
[ledgerocksolution2@comcast.net](mailto:ledgerocksolution2@comcast.net)

or call 717.683.7453

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# Questions



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