

Organizational Agility and Culture

Creating a Robust Senior Care

Organization: Implementing an Entrepreneurial Operating System

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Background: Cottage Caregivers is a family-based, mid-sized senior care agency with approximately 100 employees that is overseen by a majority female management team of 6 individuals. For nearly a decade, Cottage Caregivers has been dedicated to providing care for seniors who often have cognitive impairments or mobility issues. The leadership and management team has always aimed to grow the organization. Over the past year, the team realized that an integrated approach, which preserves the positive operational and family-oriented aspects of the company while implementing sustainable operational improvements (using an entrepreneurial operating system model) and cultivating an engagement-driven approach, will yield the best results. Four key focus areas were identified: (1) fostering a decision-making process that encourages participation from all levels, instead of a top-down approach, (2) implementing the necessary technology and infrastructure, (3) developing a deep understanding of specific metrics to monitor operational performance, and (4) maintaining responsiveness and agility in interactions with all stakeholders, including current and potential clients, employees, and community referral sources.

Intervention Detail: Our interventions include:

- Promoting collaborative decision-making: To encourage a more inclusive decision-making process, the leadership team prioritized open dialogue and listened attentively to management and caregiver input. This approach ensures everyone's voice is heard, leading to more informed decisions that can be implemented more swiftly, ultimately saving time and enhancing efficiency.
- Addressing infrastructure and technology challenges: Our management team is service-oriented and skilled in human interaction—an essential for a senior care business. To enhance their technical capabilities, we have invested in training them on several softwares (including a customer relationship management system), created auto-generating templates (DocuSign, Microsoft Office, Google Workspace), and streamlined workflows.
- Inculcating the use of key metrics: We have inculcated within the team a greater appreciation for key performance metrics and implemented shared

trackers for better coordination. Our missed-shift rate has always been below 1%. For hiring, we identified 3 metrics we need to improve in the next quarter. Another metric we identified is the number of outreach activities on a monthly basis.

- Improving responsiveness: We clarified ownership of certain tasks. One example is how we systematized responding to new incoming leads over the last 2 quarters. The lead follow-up process uses multiple appropriate modes of communication (email, phone, text, in-person), allowing for a competitive edge.

Outcomes and Impact: Various results include:

- Decision-making collaboration: While it is an ongoing effort, we have reached a commendable stage of efficiency in collaborative decision-making. We are all in, and it shows—the entire management team is fully invested in the process.
- Technology infrastructure: We have made several investments (\$20 000+), including auto-generating templates, computer hardware, printers, and video training systems. This has significantly reduced our time spent on tasks. With this increased efficiency, we are witnessing an overall improvement in our work environment.
- Key metrics: We are utilizing the hiring tracking metrics over the next 3 months to 6 months to help improve our hiring process. For outreach, similarly, we intend to have a minimum of 1 outreach activity conducted by each staff member per month. We will report on this in the next 2 quarters.
- Responsiveness: In home care services, timely responsiveness is crucial. Our focus on rapid information response is a key element in ensuring care at the point of need and keeping our competitive edge. Our responsiveness to new incoming leads is now at 100% and occurs within a few hours. These measures have contributed to us having a 25% growth in yearly revenues while preserving margins.

Aligning the Peer Review Process Across a Multihospital Health Care System

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Background: For a multihospital health care system, variability of peer review processes across hospitals