

Case Study: Increasing Efficiencies by Automating Turnover Analytics

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Categories:

- ◆ Improved Financial Health
- ◆ Benchmarking
- ◆ Enhance Efficiencies

About the Organization

Organization Name:

Beacon Health Management

Main Contributor:

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Organization Type:

Skilled Nursing Facilities

Organization Description:

From facility management to financial services, we partner with senior health care facility owners to help them provide quality care to their residents. Operating 26 facilities in two states, our mission is to meet and exceed the expectations of our customers—each and every day.

Project Description

Beacon Health Management wanted to move away from a manual process for calculating turnover to an automated process.

Project Partner

CareWork Unified Operations Platform — Analytics, Workflow, and Automation Operating System — HR Automation Project

Application Area

HR, Financial

Vendor Core Services Offered

Dashboards, Data Visualization, Integrity Audits, Operating System, Workflow, Task Management, Automation, Integration, API development and management, Decision Support, Benchmarking.

Business Model

Return on investment (ROI) of data analytics technologies

Implementation Approach

Strategic process discovery beginning with “the why” end-result and working backward to define requirements, process flows, and the reason to use the information. The focus is on operations. We leave the tech behind it to our partner, CareWork.

Turnover & Retention Automated Data Analytics — HR Automation Project

I have had an initiative over the last several years to reduce turnover across the organization, and it has been successful. There are many factors that contribute to churn, and to address them quickly and effectively, analysis must happen frequently. My goal as a starting point was to analyze turnover rates by organization and by department, and benchmark turnover results weekly against company averages. This was a large manual effort and I realized that I didn't have the time to pull it off. The compromise was to perform this manual analysis monthly in a month-over-month view year-to-date, and annually year-over-year. This allowed me

to spot trends that led to root cause discovery and put new processes in place to address potential problems. While this helped, it wasn't ideal, and it was still time-consuming, taking me about 8-10 hours per month to simply compile the information.

The first step was to remove the manual process from the turnover metrics. I want to put the data we have into action and produce new data that will spotlight additional proactive measures we can take through automated, actionable workflow and task management. The idea is to make it easy for our field management teams to work within best practices to not only retain employees, but to gather critical information when employees leave—without adding to their administrative burden. I am currently working with CareWork to fully automate not only the rest of my process, which equates to around 20-25 hours per month of my time, but to incentivize and drive behavior through automation that our management teams in the field will actually use (because it's not complicated) to ensure that balls aren't dropped due to workload, and to give all of our management and leadership teams an instant view of the state of turnover and retention management in the organization.

We are also working with CareWork to tie hard dollars to the turnover and retention metrics we have today and to illuminate the real cost of turnover in our organization by department and role using our fully loaded payroll costs and factors like separation costs, vacancy costs, and replacement costs. We're considering calculating soft factors specific to our operations as well, like training costs and loss of productivity. This effort is going to paint a picture at the facility management level through to regional and corporate leadership so that we can see in dollars the impact that turnover has in each department and the serious value our retention efforts produce. It will also allow us to build ROI-based incentive programs across the organization.

This will be a game-changer for us without a heavy lift and it will all be easily measurable through the analytics we establish in the CareWork platform.

Outcomes to Date

I worked with CareWork to automate the manual turnover analysis process and now get the information I need with the click of a button (instead of in 8-10 hours) and I can access the information weekly, monthly, and annually. Now I can manage turnover and spot potential issues quickly with the ability to impact the issues without a month of potential loss. In addition, our facility leadership teams have direct access to year-to-date turnover results when surveyors ask for it, instead of having to contact corporate and get the information in the middle of an already stressful situation. We have transparency and easy access to our turnover and retention results across the organization with zero effort.

Lessons Learned

The way we set up our labor systems to capture information when an employee is on-boarded and off-boarded didn't include all the datasets that are required to produce an accurate turnover calculation based on Society for Human Resource Management (SHRM) standards. I wanted to standardize as much as possible to take the variable subjectiveness out of the results. We had to update our system to include termination reason with specific options that our teams could select to produce an accurate calculation. The other lesson learned is that resources are wasted and ultimately, the critical analysis we need may not get done when the manual effort is too high.