

Building & Managing a Successful Team

Utilizing Predictive Index &
the Ideal Team Player to
Find Success within
your Team

May 9, 2024

State of the Industry

Revenue Cycle has grown increasingly complex and expensive.

Increased reliance on vendors, such as collection vendors, bolt-on technologies, and other vendor types fueled by:

- **Shrinking hospital margins**
Better, Faster, Cheaper
- **The Great Resignation**
War For Talent
- **Increased regulations**
No Surprises Act

RESULTING IN:

90%

of hospitals are paying more than market rates for revenue cycle products and services



50% - 65%

of accounts placed with collection outsourcers are not being worked in accordance with contract terms, service-level agreements, or state & federal regulations

5% - 7%

of monthly vendor invoices are duplicative or inappropriate



Performance gaps – disconnect between expected vs. actual results

Limited time & tools/technology to hold vendors accountable

Lack of transparency and trust

Healthfuse helps hospitals **build, operate, and optimize** their **revenue cycle vendor management office** to drive **bottom-line improvement**.

GUARANTEED COST SAVINGS & COLLECTIONS IMPROVEMENT—OR WE DON'T GET PAID.



**Reduce
Vendor Cost
by 10-20%**



**Increase
Collections
by 20-30%**



**100%
Performance
Visibility**



**Ensure Compliance
With SLAs &
Regulations**



**Save Time
via Automation
and our Team**



**Enhanced
Patient
Relations**

TECHNOLOGY | RESEARCH | ADVISORY SERVICE

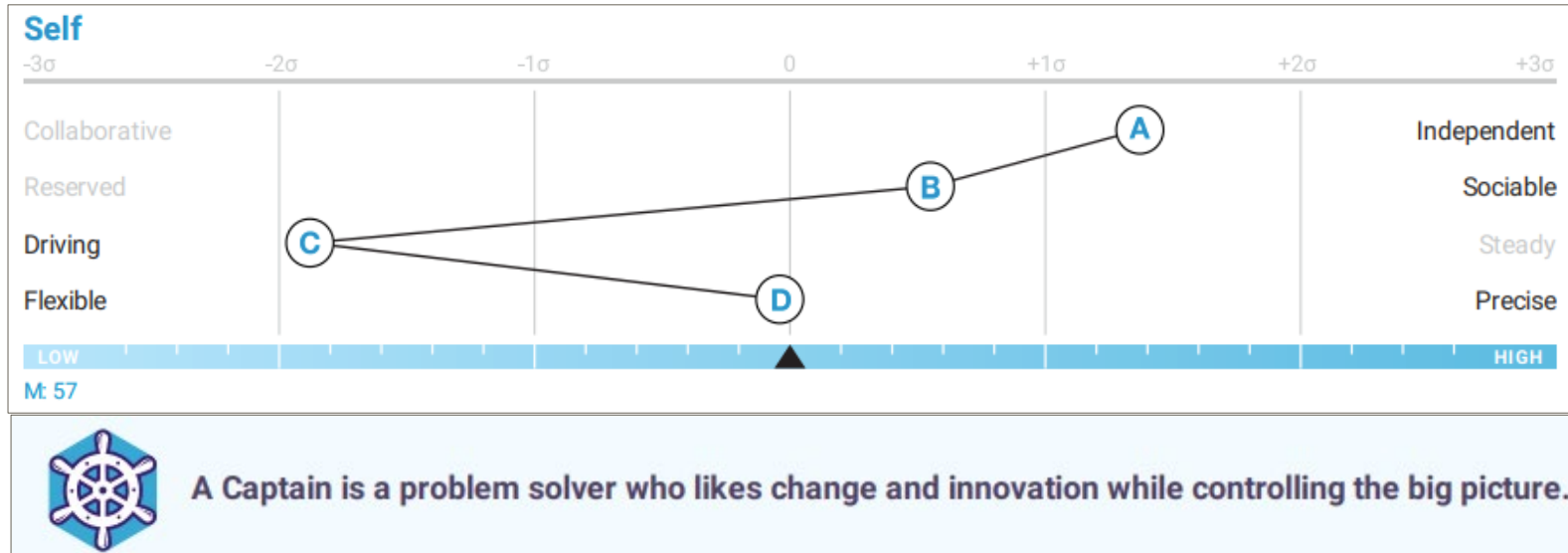
Healthfuse Program



Analysts

Client Service Advisors

About your Presenter



Kelly Welch
*Sr. Vice President,
Client Services*

- Ten years working in Client Services at Healthfuse
- Currently manages a team of 17 Advisors & Sr. Advisors
- 12 years in Healthcare Revenue Cycle
- Born and raised Cheesehead – Go Pack Go!

Agenda

- Introduction to Predictive Index (PI)
- Overview of 4 Behavioral Drivers
- Putting PI to Use – Recruiting + Team building
- Introduction to The Ideal Team Player
- Self-Coaching
- Creating Individual Ecosystems for Success



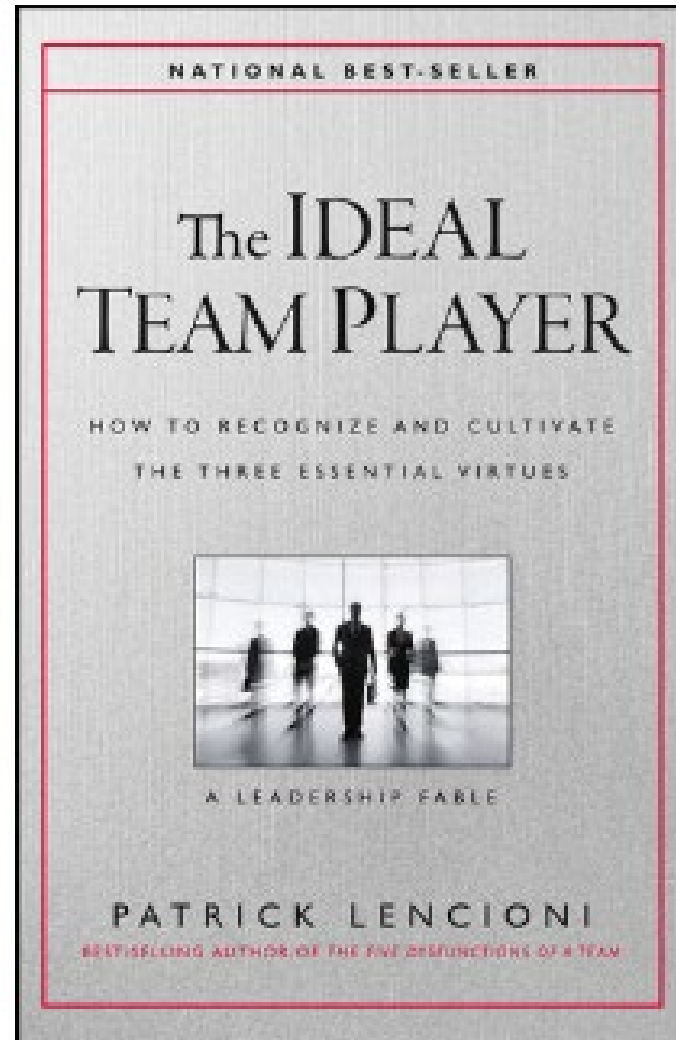
“A team is not a group of people who work together. A team is a group of people that trust each other.”

- Simon Sinek

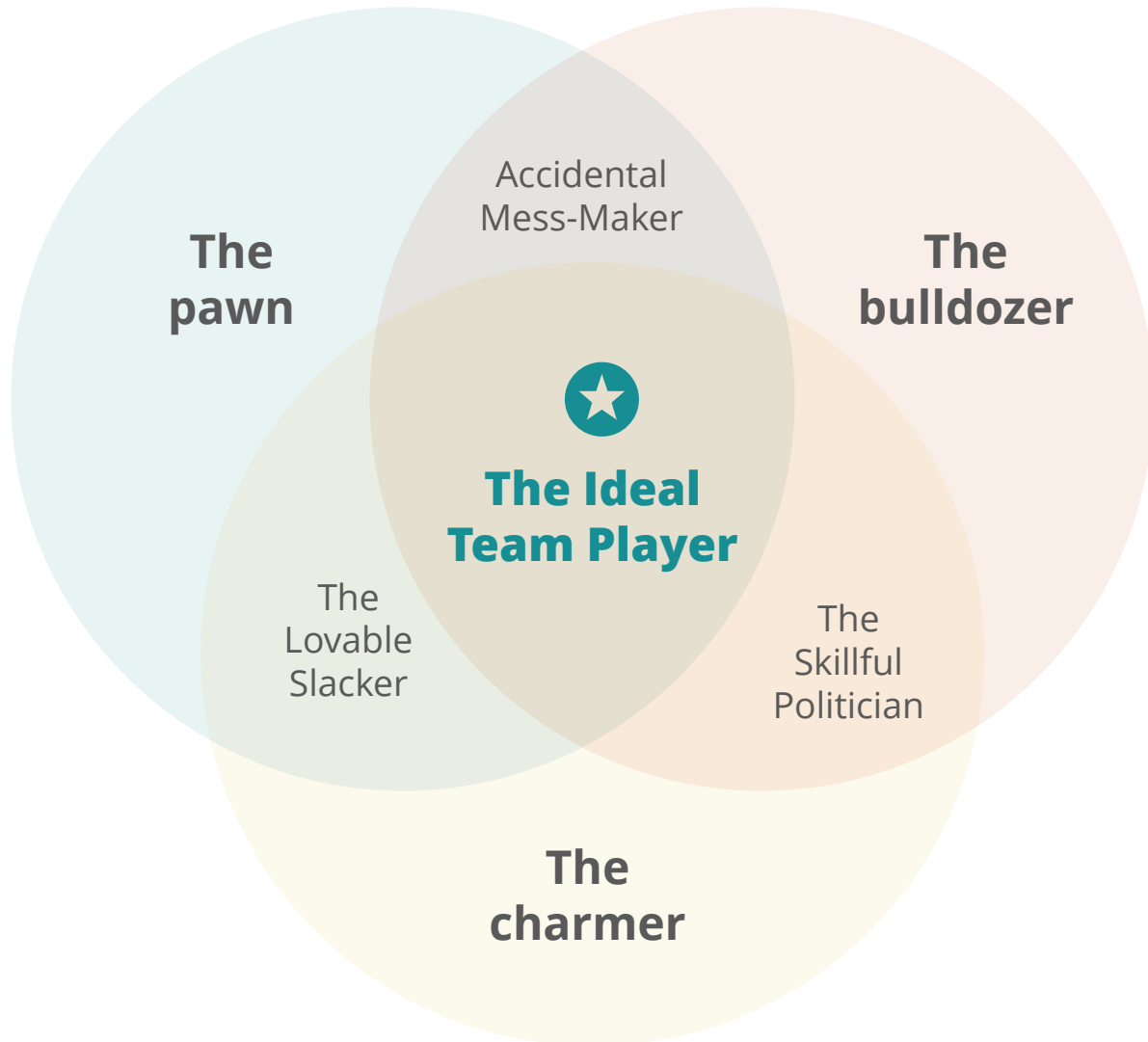


Not best practices; rather
what has been successful for **Healthfuse**

The Ideal Team Player



The Ideal Team Player



Hungry

- Strong work ethic
- Commitment to goals Make-it-happen
- Just do it!
- **Competitive drive + Innovation**

Humble

- Acknowledging that "we" is stronger/better than "me"
- Not being arrogant
- Knowing what you bring and knowing what team brings
- **Servant's heart**

Smart

- People smart (EQ vs IQ)
- Building relationships
- Being thoughtful of others' perspectives and experiences
- Treating others with respect
- Being positive
- **Intelligence**

Are You an Ideal Team Player? An Introspective Look

Healthfuse
Transparency. Relationship. Trust.

Quarterly Performance/Coaching Discussion
Part 1 of 3: Healthfuse Pillars/Values
Version: 091119

Instructions: To be completed by employee and brought to quarterly discussion. The "First Score" should be completed once per year. Progress should be discussed between employee and manager each quarter.

First core Scale: "2" = Usually "1" = Sometimes "0" = Rarely
Quarterly Date ("Q1/Q2/Q3/Q4" Scale (Meeting Dt): "1" = Improved "0" = Same "-1" = Worse

Employee Name: _____ Title: _____
Manager Name: _____ Title: _____
Quarterly Discussion Date: _____ Last Discussion: _____

I. Humble
My teammate would say:

	First Score	Q1Dt: 9/11/19	Q2Dt: _	Q3Dt: _	Q4Dt: _	Annual Total #	Annual Total %	Justification/Notes
1. I compliment or praise without hesitation						0	0%	
2. I easily admit to my mistakes						0	0%	
3. I am willing to take on lower level work for the good of the team						0	0%	
4. I gladly share credit for team accomplishments						0	0%	
5. I readily acknowledge my weaknesses						0	0%	
6. I offer and accept apologies graciously						0	0%	
Total Humility Score	0	0	0	0	0	0	0%	

II. Hungry
My teammate would say:

	First Score	Q1Dt: 9/11/19	Q2Dt: _	Q3Dt: _	Q4Dt: _	Annual Total #	Annual Total %	Justification/Notes
7. I do more than what is required in my own job						0	0%	
8. I have passion for the "mission" of the team						0	0%	
9. I feel a sense of personal responsibility for the overall success of the team						0	0%	
10. I am willing to contribute to and think about work outside of office hours						0	0%	
11. I am willing to take on tedious or challenging tasks whenever necessary						0	0%	
12. I look for opportunities to contribute outside of my area of responsibility						0	0%	
Total Hunger Score	0	0	0	0	0	0	0%	

III. Smart
My teammate would say:

	First Score	Q1Dt: 9/11/19	Q2Dt: _	Q3Dt: _	Q4Dt: _	Annual Total #	Annual Total %	Justification/Notes
13. I generally understand what others are feeling during meetings and conversations						0	0%	
14. I show empathy to others on the team						0	0%	
15. I demonstrate an interest in the lives of my teammates						0	0%	
16. I am an attentive listener						0	0%	
17. I am aware of how my words and actions impact others on the team						0	0%	
18. I adjust my behavior and style to fit the nature of a conversation or relationship						0	0%	
Total Smart Score	0	0	0	0	0	0	0%	

Healthfuse
Transparency. Relationship. Trust.

Quarterly Performance/Coaching Discussion
Part 3 of 3: Goals & Outcomes
Version: 091119

Instructions: To be completed by employee and brought to quarterly discussion. Goals should be completed no less than once per year. Manager and employee to meet and discuss quarterly and complete next steps together. When Parts 1, 2, and 3 are completed, employee to submit to manager and retain a copy for record keeping.

Employee Name: _____ Title: _____
Manager Name: _____ Title: _____
Quarterly Discussion Date: 01/00/00 Last Discussion: 01/00/00

V. Outcome Goals (Client value + CRM/renewal + Healthfuse value + professional development + innovation)

	Outcome Goal Description	Quarterly Goal	Annual Goal	Quarterly Achievement	Annual Achievement	Annual Achievement	Variance & Justification
1							
2							
3							
4							
5							

VI. Short Term Career Goals (12-18 Months)

	Short Term Goals	Progress Since Last Quarter	What Can I Do to Get Closer to Achieving My Goal?	What Can Manager Do to Support Me in Achieving This Goal?
1				
2				
3				

VII. BHAG (Big Hairy Audacious Goal - Long Term)

	BHAGs	Progress Since Last Quarter	What Can I Do to Get Closer to Achieving My Goal?	What Can Manager Do to Support Me in Achieving This Goal?
1				
2				
3				

VIII. Other Discussion Items (issues impeding goal, personal matters impeding performance, etc)

1	
2	
3	

IX. Next Steps

1	
2	
3	

However, To Be a Good Team Player...

1

It is critical to understand your own natural behaviors and areas of caution and;

2

Understand the same natural behaviors, needs, and drivers of the team in which you manage or interact with each day

3

... Insert Predictive Index!

What is Predictive Index?

- The Predictive Index is an assessment that measures behavioral drives as well as cognitive ability
- **PI helps business leaders:**
 - Understand the needs of a specific role, team, project, or business strategy
 - Collect candidate or employee “people data”
 - Use that data to make more informed, objective decisions
- Created in the 1950s by Arnold Daniels, Predictive Index has been used by thousands of organizations in nearly every job and industry around the world

PI Explains the Whole Person

The whole person shows up at work – you can't pick and choose what you get or see.
Predictive Index helps us assess the motivators and drives of the **WHOLE** person



Head

Behavioral Traits
Cognitive reasoning



Heart

Core Values
Interests and Beliefs



Briefcase

Professional Choices
Resume

What PI Measures: The 4 Behavioral Drivers

Dominance



Extraversion



Patience



Formality



Dominance: The “A” Trait

Dominance: The drive to exert one’s influence on people or events

- Someone with a high dominance is highly controlling, assertive, and self-confident. This person enjoys being challenged, is comfortable with conflict, and likes autonomy in their day-to-day. Will have a hard time not being their own boss, foot-on-the-gas-pedal type of person – has a hard time being in the passenger seat.
- The lower the dominance, the more need the person will have for harmony and collaboration. This person is accepting of company policies and generally happy to go along with others’ ideas. Low dominance employees prefer to be recognized as part of a team, and they tend to shy away from individual competition.

Extraversion: The “B” Trait

Extraversion: The Drive for social interaction with other people

- This is often misunderstood for how good a person is at communicating with others. Rather, this trait represents the method in which a person goes about processing information. This is huge for team building and management, as it helps a leader understand how a person prefers to receive and process information.
- Someone with a high B trait connects easily with others, craves social acceptance, and needs opportunities to influence others. This person is outgoing, convincing, animated and enthusiastic. High extraversion employees prefer public recognition and like seeing visible signs of accomplishments.
- Someone with a lower B trait is often misunderstood as being disengaged; they're often quieter, listens instead of participates. A person with a low B trait will be more successful and engaged if they have time to prepare ahead of a meeting rather than be put on the spot. This person takes time to trust others, values his or her privacy, and needs opportunities to reflect.

Patience: The “C” Trait

Patience: The drive for consistency and stability

- Someone with a high C trait craves a stable work environment and the ability to work at a steady pace. This person will thrive off repetitious work and predictable workflows and is generally patient and calm. High patience employees tend to form long-term affiliations and like being recognized for their loyalty.
- An individual with a low C trait will thrive off an environment with variety, freedom from repetition, and opportunities to handle multiple priorities. This person is comfortable with change, enjoys doing things “on the fly”, and will respond to tasks without needing to understand the “why”. This person is often viewed as intense, restless, and impatient.

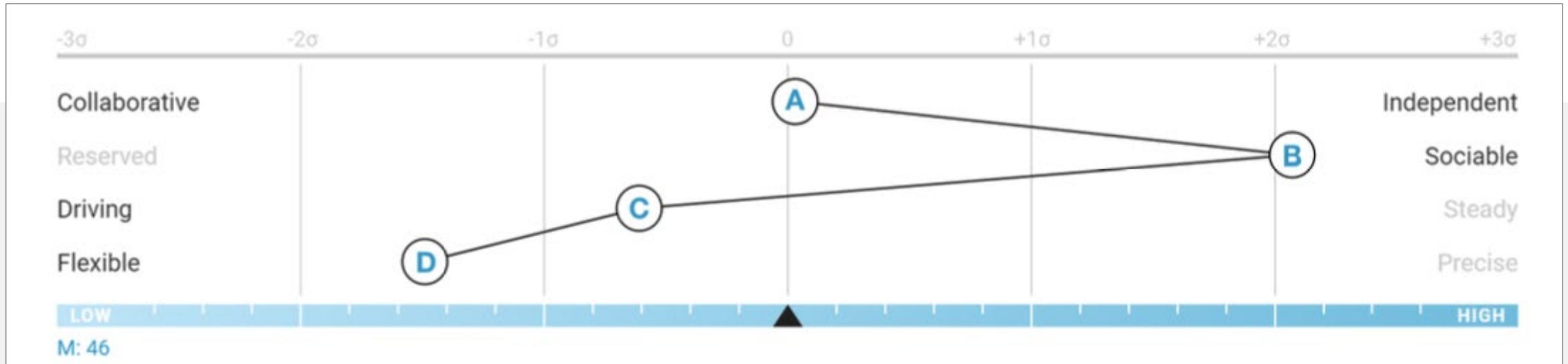
Formality: The “D” Trait

Formality: The drive to conform to rules and structure

- A person with a high “D” trait needs clarity of expectations and time to master the task at hand. This person sees him or herself as a subject matter expert and thus needs freedom from risk of error. This person is often viewed as a perfectionist and will have more of a “foot-on-the-breaks” approach to ensure thoroughness and preciseness in their work. This person will be less decisive in nature, but their accuracy levels will be sound.
- Someone with low formality needs freedom from a rigid structure as well as freedom from formal rules and controls. This person is tolerant of ambiguity, likes to be spontaneous, and would rather delegate the details to others. A person with a low “D” trait is decisive, though accuracy levels may be compromised as a result.

Profile Reading Patterns

- **Location:** Variance to the mid-point – is the behavioral trait Moderately/Very/Extremely High or Low prevalent for that employee?
- The further from mid-point, the more predictable, but much less likely to change; the closer to the mid-point, the more flexible that person can be

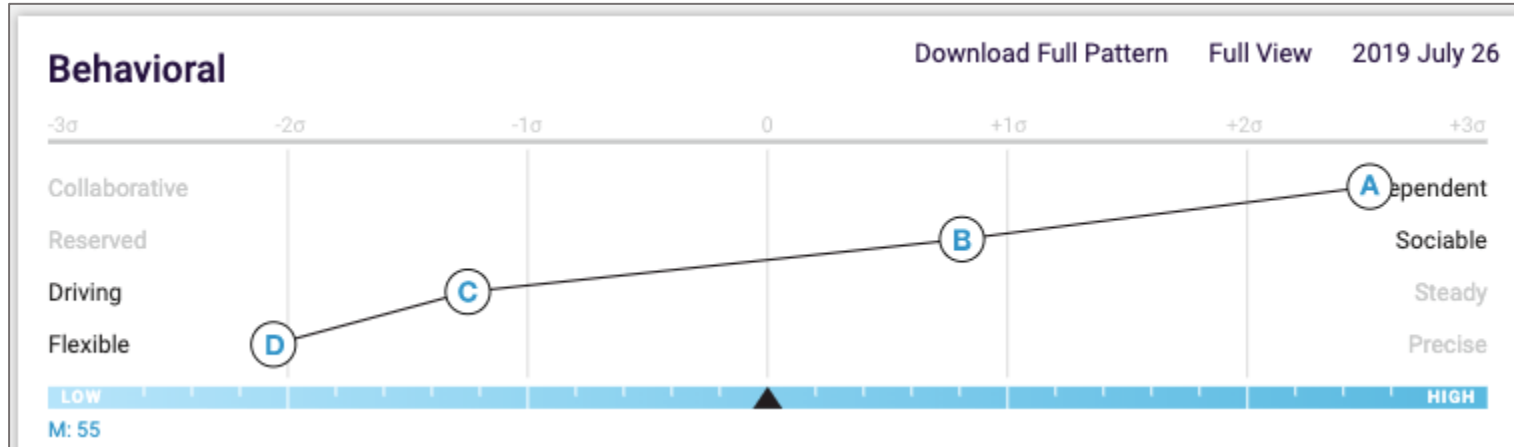


The more Sigma to the **left** a trait falls, the lower the need, or the less pronounced the trait

If a trait falls on the **mid-point**, it's treated as situational for the employee – there is flexibility based on the factors of the situation that an employee is faced with

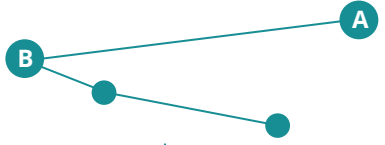
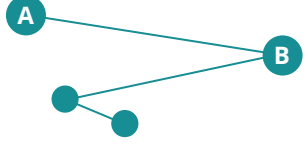
The more Sigma to the **right** a trait falls, the higher the need, or the more pronounced the trait

Example Pattern



<p>A Dominance</p> <p>Independent</p> <p>Is extremely...</p> <ul style="list-style-type: none"> Independent Assertive Self-confident <p>Needs lots of...</p> <ul style="list-style-type: none"> Independence Control of own activities To be challenged 	<p>D Formality</p> <p>Flexible</p> <p>Is extremely...</p> <ul style="list-style-type: none"> Informal Tolerant of uncertainty Flexible <p>Needs lots of...</p> <ul style="list-style-type: none"> Freedom from rigid structure Freedom of expression Opportunities to delegate details 	<p>C Patience</p> <p>Driving</p> <p>Is very...</p> <ul style="list-style-type: none"> Intense Restless Driving <p>Needs lots of...</p> <ul style="list-style-type: none"> Variety Opportunities to work at a faster than average pace Mobility 	<p>B Extraversion</p> <p>Sociable</p> <p>Is moderately...</p> <ul style="list-style-type: none"> Outgoing People oriented Persuasive <p>Needs some...</p> <ul style="list-style-type: none"> Opportunities to interact Social acceptance Opportunities to influence
---	--	--	---

Factor Combinations: Relationship of “A” Trait to Others

A > B: Task Oriented	B > A: People Oriented
	
<p>Communicating</p> <ul style="list-style-type: none"> • Direct – to the point • Blunt under pressure 	<p>Communicating</p> <ul style="list-style-type: none"> • Empathetic • Social
<p>Delegating Authority</p> <ul style="list-style-type: none"> • Holds onto control tightly • Find it hard 	<p>Delegating Authority</p> <ul style="list-style-type: none"> • Sharing • Delegates easily
<p>Problem Solving</p> <ul style="list-style-type: none"> • Creative solutions • Heads down analytical 	<p>Problem Solving</p> <ul style="list-style-type: none"> • Collaborative • Talks it through with others
<p>Decision Making</p> <ul style="list-style-type: none"> • Individual • “Decide and announce” 	<p>Decision Making</p> <ul style="list-style-type: none"> • Likes consensus • People focused

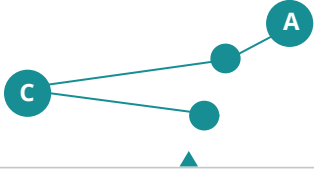
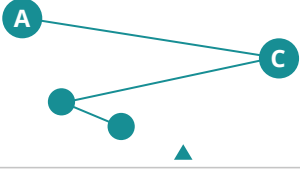


**Task or People
Oriented**

Influences:

Communicating
Delegating Authority
Problem Solving
Decision Making

Factor Combinations: Relationship of “A” Trait to Others

A > C: Proactive	C > A: Responsive
	
<p>Responding to Pressure</p> <ul style="list-style-type: none"> • Thrive under pressure • Positive response 	<p>Responding to Pressure</p> <ul style="list-style-type: none"> • Tentative • With caution
<p>Adjusting/Adapting to Change</p> <ul style="list-style-type: none"> • Adapts easily • A change agent 	<p>Adjusting/Adapting to Change</p> <ul style="list-style-type: none"> • Takes time • Needs to understand why
<p>Taking Action</p> <ul style="list-style-type: none"> • Decisive • Proactive 	<p>Taking Action</p> <ul style="list-style-type: none"> • Carefully • Responsively
<p>Listening</p> <ul style="list-style-type: none"> • Does so sparingly • Finds it difficult 	<p>Listening</p> <ul style="list-style-type: none"> • Listens well • Thoroughly

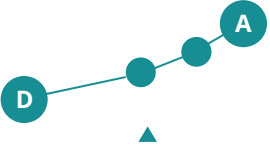
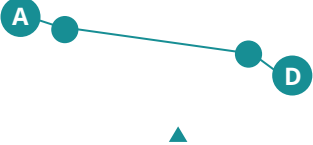


**Proactive
or Responsive**

Influences:

Responding to Pressure
Adjusting to Change
Taking Action
Listening

Factor Combinations: Relationship of “A” Trait to Others

A > D: Comfortable with Risk	D > A: Cautious with Risk
	
<p>Perception of Risk</p> <ul style="list-style-type: none"> • Risk = Opportunity • Bring it on – it’s fun 	<p>Perception of Risk</p> <ul style="list-style-type: none"> • Mitigate/ Protect • Worrisome
<p>Decision Making</p> <ul style="list-style-type: none"> • Quickly • Easily 	<p>Decision Making</p> <ul style="list-style-type: none"> • Carefully • Cautiously
<p>Need for rules and processes</p> <ul style="list-style-type: none"> • Minimal • Rules are just “suggestions” 	<p>Need for rules and processes</p> <ul style="list-style-type: none"> • Strong need • Needs clarity around rules
<p>Generalist vs. Specialist</p> <ul style="list-style-type: none"> • Generalist 	<p>Generalist vs. Specialist</p> <ul style="list-style-type: none"> • Specialist



**Comfortable or
Cautious with Risk**

Influences:

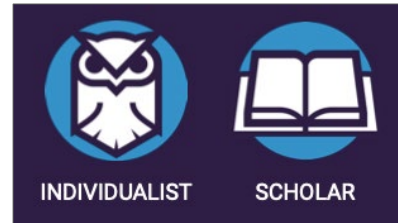
Perception of Risk

Decision Making

Needs for Rules and Processes

Generalist vs Specialist

Profile Categories



- **Analytical Profiles:** More dominant than extraverted and work at a faster pace. They are generally more task oriented as opposed to people oriented.
- **Persistent Profiles:** More dominant than extraverted, with a high amount of patience. In the workplace, people with profiles in the Persistent group are generally task-oriented and deliberate and thrive when they have control over their own work.
- **Social Profiles:** Highly extraverted compared to other behavioral drives. In the workplace, people in this group tend to focus on relationships.
- **Stabilizing Profiles:** Low amount of dominance and extraversion, with high patience and formality. People with profiles in the Stabilizing group are generally steady, detailed, and work well with structure and processes.

Healthfuse: Goals of Utilizing the Ideal Team Player & Predictive Index



Recruiting/
Hiring Selection + Training

Employee Engagement & Retention

Professional Development

Improving Team Communication & Collaboration



Recruiting and Hiring

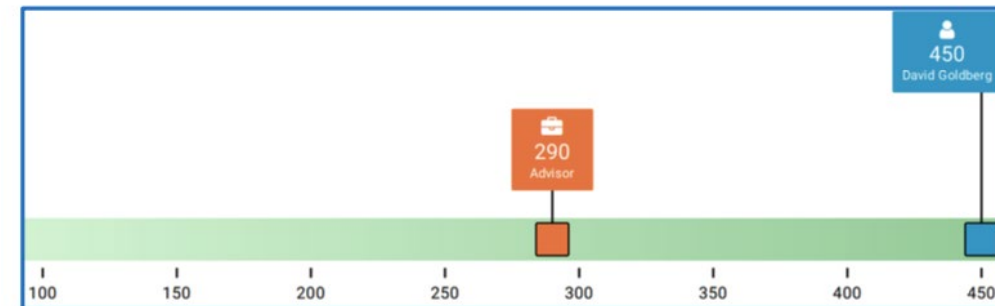
- **Development of Ideal Candidate Profile**

- For each position within Healthfuse, we have been able to identify the common traits possessed by our top performers to build an ideal candidate profile.
- Each candidate is assessed up against this profile to determine if there's a fit. Specific traits falling outside of the target range allows interviewers to tailor questions to focus on that specific trait.
- In addition to the Candidate Behavioral Profile, the Cognitive score helps us assess each candidate's problem-solving skills and the ability to think strategically.

Example Candidate: Advisor (Behavioral)




Example Candidate: Advisor (Cognitive)



- **Management Strategy Guide**

- Allows each manager to have insight into the type of environment and communication style required for the success and engagement of each direct report. At Healthfuse, managers are encouraged to evaluate each of their direct report's profiles and Management Strategy Guides no less than quarterly to self-reflect on their individualized management approach.

 **Jason is a Persuader.**
A Persuader is a risk-taking, socially poised and motivating team builder.

Strategies based on how Jason interacts in the workplace:

<input type="checkbox"/> Encourage both independent and collaborative opportunities for goal achievement	<input type="checkbox"/> Give them challenges and solicit input	<input type="checkbox"/> Give them opportunities to identify solutions, collaboratively or independently, as they so choose	<input type="checkbox"/> Allow independence and control over their own activities
--	---	---	---

Strategies based on how Jason takes action:

<input type="checkbox"/> Give them frequent challenges and varied tasks	<input type="checkbox"/> Provide them with challenging assignments that require a quick turnaround	<input type="checkbox"/> Allow them to voice their opinions and act on their own ideas and initiatives	<input type="checkbox"/> Keep them free from routines and repetition
---	--	--	--

Strategies based on how Jason deals with the risk and decision making:

<input type="checkbox"/> Give them opportunities to make decisions and influence the big picture	<input type="checkbox"/> Provide them with high-level goals but let them achieve them in their own way	<input type="checkbox"/> Give them authority to make decisions and solve problems their way	<input type="checkbox"/> Stay receptive to new ideas and change with minimal oversight of their activities
--	--	---	--

- **Self-Coaching Guide**

- Each employee has visibility into their natural strengths, and how their areas of caution may be perceived by others on their team
- Self-Coaching tips provided for each employee that are encouraged to be evaluated each quarter as they prepare for performance discussion

DOMINANCE (A) - The need to control

EXTREMELY	VERY	MODERATELY	MODERATELY	VERY <small>A</small>	EXTREMELY		
<p>STRENGTHS</p> <ul style="list-style-type: none"> · Understanding and collaborative · Accepting of others' decisions · Supportive management style · Interested in team welfare and development 		<p>CAUTIONS</p> <ul style="list-style-type: none"> · May shy away from tough conversations · May have difficulty making unpopular decisions · May be seen as too cautious or not strategic enough 		<p>STRENGTHS</p> <ul style="list-style-type: none"> · Drives change and challenges status quo · Seeks to lead and have an impact · Innovative, self-motivated · Able to think "big picture" 		<p>CAUTIONS</p> <ul style="list-style-type: none"> · May be seen as overly aggressive · May intimidate rather than motivate · May have difficulty delegating authority · May appear to be tough-minded and directive 	
<p>SELF-COACHING TIPS</p> <ul style="list-style-type: none"> · Shift your mindset from "I want to go along" to "I want to be fair" · Stand your ground when you know you're correct · Come to situations and meetings prepared to contribute 				<p>SELF-COACHING TIPS</p> <ul style="list-style-type: none"> · Actively seek input from multiple sources · Practice active listening and allow people to express their opinions or ideas · Think before you speak; think of how your message will be received 			

Improving Team Communication & Collaboration



Healthfuse
Transparency, Relationship, Trust.

Quarterly Performance/Coaching Discussion
Part 1 of 3: Healthfuse Pillars/Virtues
Version: 091119

Instructions: To be completed by employee and brought to quarterly discussion. The "First Score" should be completed once per year. Progress should be discussed between employee and manager each quarter.

First score Scale: "2" = Usually "1" = Sometimes "0" = Rarely
Quarterly Date ("Q1D") Scale (Meeting D): "1" = Improved "0" = Same " -1" = Worse

Employee Name: _____ **Title:** _____
Manager Name: _____ **Title:** _____
Quarterly Discussion Date: _____ **Last Discussion:** _____

I. Humble

My teammate would say:

	First Score	Q1D: 9/11/19	Q2D: _	Q3D: _	Q4D: _	Annual Total #	Annual Total %	Justification/Notes
1 I compliment or praise without hesitation						0	0%	
2 I easily admit to my mistakes						0	0%	
3 I am willing to take on lower-level work for the good of the team						0	0%	
4 I gladly share credit for team accomplishments						0	0%	
5 I readily acknowledge my weaknesses						0	0%	
6 I offer and accept apologies graciously						0	0%	
Total Humility Score	0	0	0	0	0	0	0%	

II. Hungry

My teammate would say:

	First Score	Q1D: 9/11/19	Q2D: _	Q3D: _	Q4D: _	Annual Total #	Annual Total %	Justification/Notes
7 I do more than what is required in my own job						0	0%	
8 I have passion for the "mission" of the team						0	0%	
9 I feel a sense of personal responsibility for the overall success of the team						0	0%	
10 I am willing to contribute to and think about work outside of office hours						0	0%	
11 I am willing to take on tedious or challenging tasks whenever necessary						0	0%	
12 I look for opportunities to contribute outside of my area of responsibility						0	0%	
Total Hunger Score	0	0	0	0	0	0	0%	

III. Smart

My teammate would say:

	First Score	Q1D: 9/11/19	Q2D: _	Q3D: _	Q4D: _	Annual Total #	Annual Total %	Justification/Notes
13 I generally understand what others are feeling during meetings and conversations						0	0%	
14 I show empathy to others on the team						0	0%	
15 I demonstrate an interest in the lives of my teammates						0	0%	
16 I am an attentive listener						0	0%	
17 I am aware of how my words and actions impact others on the team						0	0%	
18 I adjust my behavior and style to fit the nature of a conversation or relationship						0	0%	
Total Smart Score	0	0	0	0	0	0	0%	

The Ideal Team Player:

- Quarterly reflection and self-assessment of the Three Virtues: Hungry, Humble, Smart
- Prioritization of Virtue for the upcoming quarter – how can I be a better teammate?

- **Utilizing Predictive Index to Understand the Needs of Ourselves & One Another:**

- Each employee is encouraged to regularly evaluate their own personal profile
- Employee profiles are shared with others amongst the team to create transparency of each other's needs, and create an environment tailoring communication styles when collaborating on projects or deliverables

Overall

Communication

Taking Action

Decision Making

Innovation & Agility: Driven by their vision and readiness to risk it all, teams make their mark with their entrepreneurial spirit and creative problem-solving.



- **Strengths**

- Ambitious and goal-oriented
- Connect with people quickly and easily
- Quickly adapt to change and thrive under pressure

- **Cautions**

- May be impatient to move or see results
- May have little concern about details
- May not take the time to listen closely, focusing more on the action to take

- **Tips**

- Provide team with opportunities to tackle challenges
- Don't micromanage, give space to put a plan into action and see results
- Ask specific questions about plans to confirm that details are being considered



Questions?



Confidential.
Do not distribute.

Copyright 2024 Healthfuse. All rights reserved.

All information appearing in this presentation may not be used or reproduced without the prior written permission of Healthfuse.