



# Health Care Workforce Toolkit

6 strategies leaders can use to strengthen and inspire the health care workforce

Health care is experiencing a once-in-a-generation workforce challenge. Leaders need strategies to reconnect with talent, simplify workflows, empower informed decisions, and gain agreement from leadership about the kinds of investments that will support the workforce and advance the business.

This toolkit offers 6 strategies leaders can use to strengthen and stabilize their workforce and includes considerations for mapping enterprise-wide transformation.





## Strategy 1

# Listen and learn

People are not static, their lives are transforming every day – their personal life, professional goals, and feelings about their workplace challenges continually change. To understand what you need to keep your workforce connected to your organization, you first need to learn more about them – and invite them to be part of the solution to workplace challenges.

By listening more closely, managers can start to understand what's important to employees, how they assess their work life and environment, and if they are looking for training, growth or better work/life integration. With richer sources of contextual data, HR and department leaders can put together plans that make the most sense for each unit or team.



# 74%

of employees report they are more effective at their job when they feel heard\*

---

Here's a list of tools that help pinpoint employee pressures and make connections between individual performance and the company mission.

- **One-on-one risk assessments** help get ahead of issues that lead to employee disengagement. When managers personally connect with each individual, they may learn if family situations, caregiving, illness, schooling or career planning are unaligned with their current work situation.
- **Onsite rounding logs** help offset employee frustration by ensuring leaders get a firsthand understanding of workplace challenges. Ask leaders and managers to visit their team's workplace and talk to employees onsite to understand how the physical work environment may be causing them to feel challenged, unsafe or unsupported.
- **Recognition logs** help employees connect their efforts to the organizational mission by publicly acknowledging how their work had a positive impact on the health, well-being and satisfaction of the consumer.
- **Engagement surveys** reveal which areas of your workplace have the most impact on employee satisfaction by measuring the level of connection individuals have with their daily work, their coworkers and how they view your company as a whole.
- **Pulse surveys** measure the sentiment employees have toward changes you are making to improve the workplace.

- **Exit interviews** uncover what prompted employees to seek new employment, what challenges they faced and why they didn't find options with you.
- **Exit surveys** offered by third parties help leaders gather unbiased information about how they compare with other employers and also validate what's heard in the exit interviews.

See **Expanding the use of workforce data for more ways to apply this information.**

## A good first step

Connect with managers who are already doing in-person one-on-ones and learn what their experience has been.

---

## Strategy 2

# Inspire and innovate from the ground up

Leaders can't be everywhere every day. Many don't see and might never imagine the daily challenges managers and workers face. Taking a "ground-up" approach is straightforward and speedy, and it empowers individuals to share ideas and see them implemented without bureaucratic delay.

### This process is agile and fast-acting:

1. Leaders encourage managers to host regular idea sessions with their team that identify workplace issues and potential solutions.
2. Managers and their team identify the metrics they want to change. These metrics should include both worker and consumer satisfaction if possible.
3. Managers and their team share ideas on how technology can be enhanced or used to simplify workflows, facilitate upskilling and ease workforce pressures related to the issue.
4. Managers and their team clarify what roles and responsibilities might change.
5. Managers identify any needed resources, policy changes or investments required.

6. Managers and their team draft a timeline for implementation of the idea. Aim for a test within 45 days.
7. Managers connect with the key stakeholders who are required to confirm that the idea can be properly implemented.
8. Leaders set ground rules so that senior executives cannot kill an idea before an approved test.
9. Leaders recognize, celebrate and share the effort with other teams.

In addition to coming up with new ideas for under-recognized issues, managers and staff feel liberated to have the agency to solve some of their own problems. This helps develop managers into leaders, empowers team members, and improves relationships between managers and their staff. Other teams will be inspired when they see their peers being innovative and successful. When sustained, this approach will help create a culture of innovation – a key antidote to low employee engagement and quiet quitting.

### A good first step

Meet with executives to introduce this approach and discuss the benefits of a ground-up approach.



### Strategy 3

# Prioritize technology that makes us more human

The promise of technology is that it can simplify an experience, transaction or decision so that humans can focus on what is meaningful to them. People embrace tools that enhance their mental capabilities, strengthen or protect them physically, and allow them to be more social. But too often health care employees feel burdened by technology demands and are frustrated with its shortcomings.

When redesigning workflows leaders need to ask:

**“How can technology bring more joy and satisfaction to the work?”**



Here's a quick checklist that will help ensure your technology will deliver a human-centered return for your investment.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Those who will use the technology were included in development and implementation of the tool to ensure all business requirements were met.
<input type="checkbox"/>	<input type="checkbox"/>	Insight from listening sessions contributed to the process.
<input type="checkbox"/>	<input type="checkbox"/>	New tools are not being bolted on to low-performing infrastructure.
<input type="checkbox"/>	<input type="checkbox"/>	Training on technology is a seamless, everyday action.
<input type="checkbox"/>	<input type="checkbox"/>	Regular updates and refinements are based on employee input.
<input type="checkbox"/>	<input type="checkbox"/>	Managers receive regular feedback from employees on the usability of their digital tools.
<input type="checkbox"/>	<input type="checkbox"/>	Manual processes have been reduced, freeing employees to solve more complex or more consumer-focused problems.
<input type="checkbox"/>	<input type="checkbox"/>	Decision support is swift, accurate, easy to access and improves financial and clinical outcomes.
<input type="checkbox"/>	<input type="checkbox"/>	The experience satisfies both the consumer and the worker.
<input type="checkbox"/>	<input type="checkbox"/>	Technology supports or frees up staff to take on more complex or human-centered tasks.

### A good first step

Survey employees to have them rate their digital tools for accuracy, simplicity and the ability to satisfy the consumer.

---

Strategy 4

# Guide decisions with connected organizational data

By correlating human resource, clinical, financial and operational data, leaders will be able to align around the workforce investments that will have the most impact on the business. Connecting these insights will illuminate exactly how and where more support for a strong, sustainable workforce is required for the organization to meet their mission and their financial goals.



---

It's important to identify where workforce challenges are impacting business performance. Here are some data sources and analysis to consider including in your process.

- **Consumer engagement**

Workforce challenges impact consumer sentiment, satisfaction and quality scores. It's very important for leaders to be able to draw connections between organizational design, workforce structures and consumer engagement levels. What are your current volumes of member sign-ups, service calls, or new patient visits? How do those metrics connect to staffing concerns? If your business metrics change by department, do your operational and human resources metrics change as well?

- **Departmental diagnosis**

Every team and every department has unique workforce environments, challenges and opportunities. A departmental diagnosis examines employer Net Promoter Scores (eNPS), error rates, consumer satisfaction levels, and turnover. These indicators help leaders uncover areas of high risk and prioritize the investigation of root causes of instability. Conversely, they can also measure areas of high engagement and growth and reveal where managers, workflows and innovative strategies are succeeding.

- **Fiscal impact**

What is the total replacement cost of losing an employee and what is the fiscal impact that turnover levels are having on other retention and recruitment efforts? Are other employees at risk? What departments are losing revenue due to staff transitions? What is the reputational risk?

- **Turnover data by department and demographics**

Look at the demographics or departments that are experiencing the highest separation rate. You may discover trends in age, department size and tenure. Who are the 20% of your workforce leading 80% of the turnover? What were the historical trends and what has changed? What is the impact that turnover in one area is having on other employees and what is the business risk of that impact?

- **Workforce demographics**

Education, training and caregiving demands change with age. Knowing where your workforce demographics are shifting helps anticipate employee needs so there is more time to adjust to meet them. Can you retain experienced nurses by offering virtual work options? Does a large segment face childcare or eldercare concerns? Are your most talented individuals looking for career growth?

- **Employee engagement in HR systems**

Employee portals are measurable tools leaders can use to understand which employees connect to training, tools and benefits. Do these portals effectively engage? Do the functions of the portal match employee needs such as flexible scheduling, self-guided training, and access to benefits like transportation vouchers, family care or career growth?

## A good first step

Bring leaders together to choose one business goal that needs attention and could benefit from a coordinated look at data.



---

## Strategy 5

# Expand the talent pool with the future in mind

Having the right talent is as important as having great talent, and today's leaders are challenged to find new sources of human capital. Having a clear picture of what you need today and a good idea of what the future looks like will help ensure you are attracting people for the right roles to succeed.



- Recruit from existing staff to close immediate gaps. Drop unnecessary job requirements, prioritize training and leverage technology to upskill staff.
- Offer flexible scheduling, self-scheduling, hybrid and remote work, part-time, full-time and job-sharing. This can make your workplace viable to a broader pool.
- Offer health care training as scholarships for people entering the workforce to help them advance their career certifications for clinical and administrative skills.
- Offer apprenticeships to juniors and seniors from local high schools as part of your recruitment strategy.
- Open additional talent pipelines from out of state or internationally.
- Outsource services to increase flexibility, bring in skilled resources to support training, or free up your staff to focus on core competencies.
- Leverage your community relationships, current employees, past employees and all digital channels to promote your brand and the quality of your workplace, regardless of any immediate employment opportunities.
- Maintain a database of prospective employees and connect with them on a regular basis.

### A good first step

Identify the roles and skill sets you need today and 2 years from now.

## Strategy 6

# Gain consensus for guided investment

Gaining agreement from leadership can be challenging, but it is required for organizations to be agile, adaptive and effectively compete for talent. These 10 actions will help your leadership team guide discussion, decision-making and investment.



- Reconfirm your mission, business objectives and core strategic goals. Agree on what you want to be known for as a workplace.
- Assess how quickly and how deeply your community and your customers' needs are changing.
- Take stock of how your work environment has changed over the past 2 years.
- Provide demographic and financial data on how your workforce is evolving.
- Offer direct quotes on how employees experience work at your organization.
- Share what employees believe they need to succeed and to stay.
- Define what must change in order to develop and sustain the workforce you need so you can deliver on your mission.
- Gather ideas from employees, managers and leaders.
- Prioritize investment based on how well the idea will address workforce challenges, market shifts and business objectives.
- Agree on the pace at which you need to invest and evolve.

### A good first step

Gain agreement on what you want to be known for as a workplace.



## Build a sustainable workforce with compassion and insight

Health organizations need to engage their workforce in the purpose and meaning of work, animate around values that hold one another accountable, and acknowledge that everyone needs to embrace new ways of working so we can all meet the health needs in our community – while creating an integrated, sustainable life balance.

These strategies will help leaders build more insight into planning, turn agility into action and widen the pool of ideas, talent and opportunities that let you rise and respond to today's workforce challenges.

# Optum

Optum is a registered trademark of Optum, Inc. in the U.S. and other jurisdictions. All other brand or product names are the property of their respective owners. Because we are continuously improving our products and services, Optum reserves the right to change specifications without prior notice. Optum is an equal opportunity employer. Stock photos used.

© 2023 Optum, Inc. All rights reserved. WF9793490 3/23