

Leadership Series

Executive Highlights:

How Data is Driving Senior

Living Decision Making

THE LEADERSHIP SERIES

Michael Grust
CEO / Senior Resource Group

WHAT'S INSIDE:

Creating a plan
around data

Resident decision
making

Operations
decision making

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What to do About Data

Most senior living organizations today acknowledge they need some kind of data collection process, whether they are tracking metrics daily, weekly or monthly. The data that's collected ultimately provides a detailed and big-picture analysis of senior living operations decision making including a look into staffing, operations and resident care.

With a comprehensive plan, this data can serve as the core basis for decision making. As part of the Leadership Series, we sat down with executives to learn more about how they use data to influence their decisions, and specifically what actions they are taking based on their data initiatives.

Executives agreed that data collection allows them to analyze resident satisfaction, wellness, sales, occupancy and more. This E-Book explores the ways in which executives are using data to drive efficiency and improve operations overall.

PointClickCare is committed to working with senior living providers and our wide network of partners to advance the care of seniors by solving industry challenges through technology and data.

We are proud to have partnered with Senior Housing News to bring you the Leadership Series and to create visibility for the important work many of our current leaders are undertaking to prepare the industry for its future.

Travis Palmquist

Vice President and General Manager, Senior Living
PointClickCare

Introduction

Most senior living operators today understand the importance of collecting data, and many have tools in place to help them not only collect but also analyze data with respect to their operations.

But what do executives do with the data they collect? How does it positively impact their organizations? Looking at the bigger picture is key.

CEOs who lead their organizations to collect data typically end up gathering information competitors don't have. They are then able to position themselves favorably relative to their competition, and they can provide better care.

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Tana Gall
CEO / Blue Harbor Senior Living

Creating a Plan Around Data

Key to this approach is creating a plan to collect the right data that will influence decisions — an initiative that starts at the top.

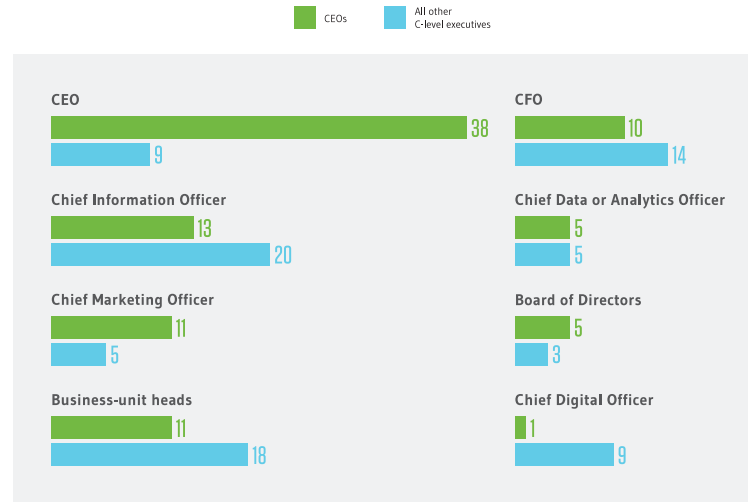
According to a study from McKinsey & Company, the job titles responsible for data collection programs across companies surveyed include CEO, Chief Information Officer, CFO, Chief Marketing Officer, and department head, among other leadership positions. Most often, CEOs set the data agenda, and acknowledge they are the ones most responsible for seeing it through.

In senior housing, an industry not known for being an early adopter of data and technology, executives say a proactive approach is paramount.

“We started our data analytics journey in probably 2009 or 2010. Nobody in our profession was even thinking about data analytics, but I started realizing: We’re going to need to know our hospital readmissions real-time,” says Phil Fogg Jr., CEO and President of Marquis Companies. “We’re going to need to know our clinical outcomes real-time, we’re going to need to know utilization numbers real-time.”

Job Titles Responsible For Data Collection Programs

Who is primarily responsible for data and analytics agenda at respondents’ organizations?



Source: McKinsey & Company



Phil Fogg Jr.
CEO and President / Marquis Companies

Focusing on Data-Driven Resident Decisions

In recent years, senior living organizations have implemented tools to collect data on resident health, wellness and satisfaction.

For example, analytics can identify patients who have similar health issues and characteristics. Executives can then see if the organization has been successful in caring for them. That information also provides predictive insights on residents that organizations can also utilize.

“It’s really simple. It’s understanding more about our patients and residents. It’s providing them with the understanding of how we can be more effective in managing that environment,” says John Morgan, former CEO of Avamere.

Providers are even utilizing data to drive decisions in areas as basic as dining. By analyzing information about how much and how frequently residents are attending meals, or where they are taking them, providers can better meet their residents’ needs and preferences.

“For each property, we see how many meals there were,” says Michael Grust, CEO of the Solana Beach, California-based Senior Resource Group, which manages a portfolio of 32 communities. Senior Resource Group, in turn, has recently updated its dining options to do away with assigned meal times and allow residents to come and go as they please.

“There are a lot of companies that believe in assigned times and assigned seating and things like that,” Grust adds. “We have 30 menu items. Choice gives a sense of dignity and independence. Obviously we’ve evolved.”

From proactively reducing health episodes to offering catered services that are specific to each resident, executives are making data-based decisions to improve resident health and happiness.

Focusing on Data-Driven Operations Decisions

Across many industries, executives analyze data to drive operations decisions. In senior living, there are some specific areas being measured to help inform choices that will create efficiencies and better outcomes. These areas include the number of sales calls conducted, the number of tours given, current and past occupancy figures, staffing levels, satisfaction and more.

Sales is one area executives are measuring closely to drive decisions.

“We look at a lot of different measurables to determine whether [salespeople] are setting themselves up for success,” says Grust.

With that data in hand, the executive team at Senior Resource Group is able to build relationships with salespeople and other employees. But the sales team shouldn’t be the only operational aspect executives examine. They also need to use data to ensure the bread and butter of senior living staff—the caregivers—are happy. In part, they can do this by analyzing data about hourly labor and shifts performed.



Michael Grust
CEO / Senior Resource Group



Tana Gall
CEO / Blue Harbor Senior Living

"I'm looking at what our paid time off looks like. How do I make sure that my caregiver can go to her son's tee-ball game, because I got to go to my son's tee-ball game? That's what I work with our department heads on," says Tana Gall, CEO of Blue Harbor Senior Living. "When you hire people, you get to know them too, and you create a team that's going to step in for each other when there's a tee-ball game."

Data also plays a vital role when it comes to keeping tabs on finances.

"We have a daily business tracker, based on occupancy. Every day we plug our census in and it tells us where our spending needs to be based on our occupancy," says Keven Bennema, founder and CEO of Charter Senior Living. "That is an enormous tool, and we talk about that in our [weekly] meetings every Monday."

In analyzing operational metrics, executives are making decisions about how and when to approach prospective residents. They're identifying ways to boost and maintain occupancy, and they're targeting spending and sales to best impact the bottom line.

Data is Here to Stay

Companies that embrace data collection for decision making will position themselves as industry leaders and will realize more efficient operations as well as higher levels of resident satisfaction.

However, successful data programs aren't created overnight, and executives acknowledge the challenges involved. According to McKinsey, 25 percent of survey respondents said the most significant challenge was creating a framework that supports analytics activities around data.

"I'm kind of an early adopter, but this was more because we wanted to lead," says Fogg. "I think people have three options: They can be the leader, and that's constant thought pain. You can be the one in the back and not make any change until you have to, or you can be in the middle and progress somewhere in the middle. We wanted to be the leader."

By embracing data, senior living executives are able to make decisions that benefit not just operational efficiencies, but the people within the organization and those served, as well.

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Keven Bennema
Founder and CEO / Charter Senior Living

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