

Lean Business Excellence in the Revenue Cycle

Tools and Strategies for Success



Agenda

1. **Welcome & Warm-Up**
2. **Lean 101: The Basics You Need to Know**
3. **Waste Not, Want Not: Identifying Inefficiencies**
4. **Pick Your Battles: Project Selection Made Simple**
5. **People Power: Stakeholder Analysis**
6. **Metrics that Matter: Measure What You Manage**
7. **Q&A and Open Forum**
8. **Wrap-Up and Call to Action**

Speakers



**Olivia
Currin-Britt, LSSBB**

Vice President
Client Success at Savista



**Stephanie
Fernandez**

Financial Clearance Leader
of GWMFA

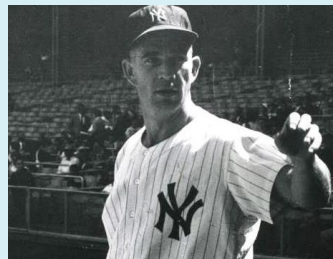
The Overachiever DNA

Olivia Currin-Britt, LSSBB
Vice President Client Success at Savista

It's in my DNA.

Key Lesson:

Strategic thinking and
continuous improvement
aren't just professional skills
– they're family heirlooms



My Original Dream

Olivia Currin-Britt, LSSBB
Vice President Client Success at Savista

I thought

I'd be
a symphony
conductor or
an artist...

Reality

Instead, I conduct...
operational
efficiencies and
revenue cycle
transformations.

Key Lesson

"Turns out, process
improvement is its
own kind of art form."

My Lean Business Epiphany

Olivia Currin-Britt, LSSBB
Vice President Client Success at Savista

I'm a true geek.

I love digging in, identifying problems, and making things better.

Core Principles I Learned Along the Way:

- 90% good is better than 0% Perfect
- Continuous improvement beats stagnant perfection
- Strategy + Execution = Real Results

Healthcare Revenue Cycle = The Ultimate Challenge

Leading with Service

Stephanie Fernandez
Financial Clearance Leader of GWMFA

I grew up

in Chicago, Illinois,
in a family that
instilled in me the
value of hard work,
perseverance, and
service.

My father,

valued the principles
of grit and
dedication. And I
learned early on that
success wasn't
handed to you—it
was earned.

My mother

a guiding force that
taught me that
leadership by
example and the
power of serving
others.

Use your strengths

Stephanie Fernandez
Financial Clearance Leader of GWMFA

1

Leadership isn't
about being in charge.

2

It's about serving
the team
Creating an environment
where everyone can excel.

3

Contribute toward a
common goal.



Celebrate small wins, inspire big change

Stephanie Fernandez
Financial Clearance Leader of GWMFA

These incremental improvements are often **where the magic happens.**

They build momentum and **reinforce the idea that positive change is possible**, no matter how daunting the challenge may seem at first.

It's like a snowball effect—small improvements lead to significant long-term change.

And that's exactly what we need in healthcare: consistent improvements over time that lead to a better, more efficient system.

Leading with Lean

Stephanie Fernandez
Financial Clearance Leader of GWMFA

1

Leadership is about
creating value, and service.

2

Driving small wins
toward a greater vision.



Lean in, it's about to get excellent!



Chat
Response

**Drop one 'waste' in
your day that you'd
love to eliminate.**

(Hint: Emails count!)

Lean, Mean, Revenue-Cycle Machine!

Lean 101: The Basics You Need to Know



A woman with long, wavy red hair and blue eyes is holding a white rectangular sign in front of her face. She is wearing a yellow long-sleeved top. The background is a solid light blue color. The sign has the text "What is Lean Business Excellence?" written on it in a bold, dark blue font.

**What is
Lean Business
Excellence?**

**Spoiler:
It's not a diet plan!**



A woman with long, wavy red hair and wide, blue eyes is holding a large white rectangular sign in front of her face. Only her eyes, eyebrows, and the top of her head are visible above the sign. She is wearing a yellow long-sleeved shirt. The background is a solid, bright blue color.

**It's like putting
your revenue cycle
on a productivity
cleanse**

A woman with long, wavy red hair and blue eyes is holding a white rectangular sign in front of her face. She is wearing a yellow long-sleeved shirt. The background is a solid light blue color. The sign contains three lines of text, each with a bolded word.

It's Trimming the fat

Flexing the
process muscles

Fueling it with
continuous improvement

Or, more officially

Lean Business Excellence is

**It's the art and
science of
maximizing value
while minimizing
waste**

**It's about
working smarter
(not harder) by**
Simplifying workflows
Eliminating inefficiencies
AND
Creating a culture of
continuous improvement

**Think of it as turning
your revenue cycle
from a sluggish
sloth into a**
Sleek, speedy cheetah
(fast, efficient)
AND
Always on the hunt
for better results.

Want something punchier?

Lean Business Excellence is

**It's where waste goes to disappear,
processes get polished,**

AND

Want something punchier?

Lean Business Excellence is

**Success is no longer 'hit or miss' —
it's 'plan, do, check, and win!'**

A woman with long, wavy red hair and blue eyes is holding a large white rectangular sign in front of her face. She is wearing a yellow long-sleeved shirt. The background is a solid light blue color. The sign has the text "Why Lean Matters in the Revenue Cycle" written on it in a bold, dark blue font.

Why Lean Matters in the Revenue Cycle

Lean Matters in the Revenue Cycle



**Nobody has time
(or money)
to waste!**



**It's about eliminating
inefficiencies like
rework, delays, and
"Oops, we forgot to bill
that" moments**



**Lean turns chaotic
processes into
clean, mean,
revenue-collecting
machines**

Lean Matters in the Revenue Cycle

Faster Payments

Streamlined processes mean fewer bottlenecks, so, cash moves in quicker

Fewer Headaches

Less rework and fewer errors = happier staff, happier patients, and happier CFOs

Smarter Prioritization

Focus on what actually moves the needle — not everything at once.

Stronger Teamwork

Lean thrives on collaboration, so silos get smashed, and communication flows.

Continuous Improvement

No more “set it and forget it” — Lean keeps your revenue cycle evolving.

A young woman with long, wavy red hair and a bright smile is holding a white rectangular sign. She is wearing a yellow long-sleeved top. The background is a solid light blue color. The sign contains text about Lean manufacturing.

In short, Lean matters

- It turns the revenue cycle from a "wild goose chase" into a "well-oiled race car."
- Less waste, more wins.

What's not to love?



Chat
Response

On a scale from 1-5

**How familiar are you
with Lean principles?**

Waste Not, Want Not:

Identifying Inefficiencies



**If it's wasting time,
it's wasting dimes.**



The 8 Types of Waste in Lean Business Excellence

aka

**"The 8 Villains of
the Revenue Cycle"**



8 Types of Waste in Lean Business Excellence

1

2

3

4

5

6

7

8



Pro Tip

These "wastes" aren't just nuisances **they're revenue blockers.**

Eliminate them, and you'll **have a faster, leaner, and greener revenue cycle.**

Which Villain is Wreaking the Most Havoc in Your Process?

Defects

"Denial Drama"

Over Production

"Report Overload"

Waiting

*"Approval
Purgatory"*

Non-Utilized Talent

*"Degree for
Data Entry"*

Transportation

*"The Document
Shuffle"*

Inventory

"Backlog Blues"

Motion

*"Click. Click.
Click."*

Extra Processing

*"Double-Check
Overload"*



Examples of Waste in the Revenue Cycle

Defects

"Denial Drama"

Over Production

"Report Overload"

Waiting

*"Approval
Purgatory"*

Non-Utilized Talent

*"Degree for
Data Entry"*

Transportation

*"The Document
Shuffle"*

Inventory

"Backlog Blues"

Motion

*"Click. Click.
Click."*

Extra Processing

*"Double-Check
Overload"*

(Real-World Scenarios)

Moral of the Story

- These wastes aren't just annoying — they're costly.
- Cut them out, and you'll see faster payments,
- Lower AR days, and happier staff.



Chat
Response

**Which type of waste
do you see most often
in your organization?**

- | | |
|------------------------|---------------------|
| 1. Defects | 5. Transportation |
| 2. Overproduction | 6. Inventory |
| 3. Waiting | 7. Motion |
| 4. Non-utilized talent | 8. Extra Processing |

Pick Your Battles:

Project Selection Made Simple



**If everything
is a priority,
then nothing is.**



How to Pick Lean Projects That Pack the Biggest Punch

Follow the Money

*"If it ain't boosting
cash flow, why bother?"*

Hunt the Headaches

*"If it makes your team
groan, it's probably
a goldmine"*

Go for the "Quick Wins"

*"Low-hanging fruit
tastes the sweetest"*

Size Matters

*"Big problems =
Big payoffs"*

Listen to the Frontline

*"The people in the
trenches know where
the landmines are"*

Data is Your BFF

*"Gut feelings are cute,
but metrics never lie"*

Pro Tip

The best Lean projects solve the biggest pains, pay off the fastest, and make life easier for your team. Bonus points if they make your CFO smile.



Success Story: From AR Chaos to Cash Flow King!

The Problem

- A Health System was drowning in a sea of aging AR
- Claims were piling up like dirty laundry
- Payments were slower than a Monday morning
- The team felt stuck in a never-ending cycle of rework, with no clear starting point

The Plan

- **Instead of "fixing everything,"** the team got *strategic*. Using Lean project prioritization
- **Zero in on one big win** — tackling denied claims >90 days old (aka "the AR dinosaurs")
 - It checked all the boxes:**
 - High Dollar Impact
 - Repeat Offender (chronic denials)
 - Quick Win Potential

The Action

- The team launched a **"Ditch the Dinos"** campaign.
- They built a task force, streamlined denial tracking, and fast-tracked appeals.
- Automation was added to flag denial trends early.

Success Story: From AR Chaos to Cash Flow King!

The Results



**AR > 90 Days
Dropped 40%**



**Cash Collected
Increased by
\$1.2M in 60 Days**



**Team Morale
Boosted**
Because wins
feel good!



The Lesson

- Don't chase every problem at once.
- Find the project with the biggest impact, focus your energy, and celebrate every win.
- The "Ditch the Dinos" campaign became a legend, inspiring future projects — and maybe even a few t-shirts.





Take a Minute

**What's one project you're
working on that can use a
Lean makeover?**

People Power:

Stakeholder Analysis





Who's on your Team? Identify Key Players





**When it comes to
a Lean Business
Excellence
project,
knowing your
key players is half
the battle.**



Here's How to Spot Them Like a Pro

The Champions

"The Hype Squad"

The Decision-Makers

"The Bosses with the Yes Button"

The Doers

"The Boots on the Ground"

The Critics

"The Skeptics & Side-Eyes"

The End Users

"The Folks Feeling the Change"

Pro Tip

Use a simple Responsible, Accountable, Consulted, Informed **"RACI Chart"** to track who's who.

The right people, in the right roles, make the difference between a flop and a Lean, Mean, Success Machine



How to Get Buy-In Without Burnout

**Start with the
"Why"**

*"People support what
they understand"*

**Quick Wins =
Big Wins**

*"Nothing motivates
like success"*

**Involve
the Doers**

*"Don't design for them,
design with them"*

**Keep It Simple,
Smarty (KISS!)**

*"Complexity kills
momentum"*

**Celebrate
Like Crazy**

*"Every win, big or small,
deserves a party"*

Bottom Line

People don't burn out from success — they burn out from confusion and chaos. Get clarity, get wins, and get everyone to the finish line with energy to spare.





Chat
Response

Which stakeholder is usually the hardest to engage?

1. Executive leaders
2. Frontline staff
3. Middle management,
4. Other

Metrics that Matter:

Measure What You Manage



How to Create KPIs That Inspire Action

(Not Confusion!)

Keep It Real

*"If it's fluff,
it's fluff"*

Make It Count

*"Chase dollars,
not decimals"*

Simple Wins the Race

*"No one reads a 40-
page dashboard"*

Actionable, Not Aspirational

*"Green means good,
red means move!"*

Visuals > Verbals

*"Pie charts? No.
Progress bars? Yes!"*

Pro Tip

Ask, “If this number changes, will we actually do something different?” If not, it’s not a metric — it’s trivia



Q&A & Open Forum

- Ask me anything – Lean-related or not!
- Use the Q&A box to submit your questions

Challenge

- Chose one Lean tool from today's session to try this week

Thank You



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