

***HFMA Conference
May 23, 2025***

Leading Through Change:

***Building Skills for Navigating
Challenges and Driving Success***

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About Me

I help medical practices optimize financial health, staff engagement, and patient experience by implementing strategic, data-driven solutions. As a practice performance strategist, I don't just identify problems, I provide sustainable, actionable strategies that drive long-term success.

Over 30 years of experience working in and teaching medical practice administration make me uniquely qualified to help leaders and practices identify and achieve their goals.





TODAY'S Objectives

1

**Understanding
Generational
Dynamics in the
Workforce**

2

**Combating
Burnout and
Boosting
Engagement**

3

**Building a Resilient
and Connected
Workplace
Culture**

4

**Identifying Blind
Spots and
Enhancing Job
Satisfaction**



Section 1: Working Across Generations

Baby Boomers (1946–1964)

Work characteristics:

Strong work ethic and dedication

Prefer hierarchical structure

Value face-to-face communication

Appreciate formal recognition

Management strategies:

Acknowledge their experience and expertise

Provide clear reporting structures

Offer opportunities to mentor younger staff

Regular in-person check-ins



60–78 Years Old

5

Gen X (1965–1980)

Work characteristics:

Independent and self-reliant

Value work-life balance

Adaptable to technology

Prefer direct communication

Management strategies:

Offer flexibility in work arrangements

Provide autonomy in project management

Keep communication concise and to the point

Recognition through career development opportunities



44–59 Years Old



28–43 Years Old

Millennials (1981–1996)

Work characteristics:

Tech-savvy and collaborative

Seek purpose in their work

Value feedback and growth

Prefer flexible work environments

Management strategies:

Regular feedback and coaching sessions

Clear career progression paths

Integration of technology in workflows

Emphasis on work-life integration



13–27 Years Old

Gen Z (1997–2012)

Work characteristics:

Digital natives with high tech expectations

Value authenticity and social impact

Prefer multimodal communication

Seek financial security and stability

Management strategies:

Leverage technology for training and communication

Provide clear structure and expectations

Regular check-ins and feedback

Connect work to broader purpose and impact

Building Bridges Across Generations:

Foster mutual respect

Adapt communication styles

Celebrate diverse perspectives as a strength

Identify and celebrate individuality

Recognize and address biases

Create and celebrate shared goals

1-Traditional Mentoring:

Senior staff sharing industry knowledge
Leadership development
Career guidance and advice

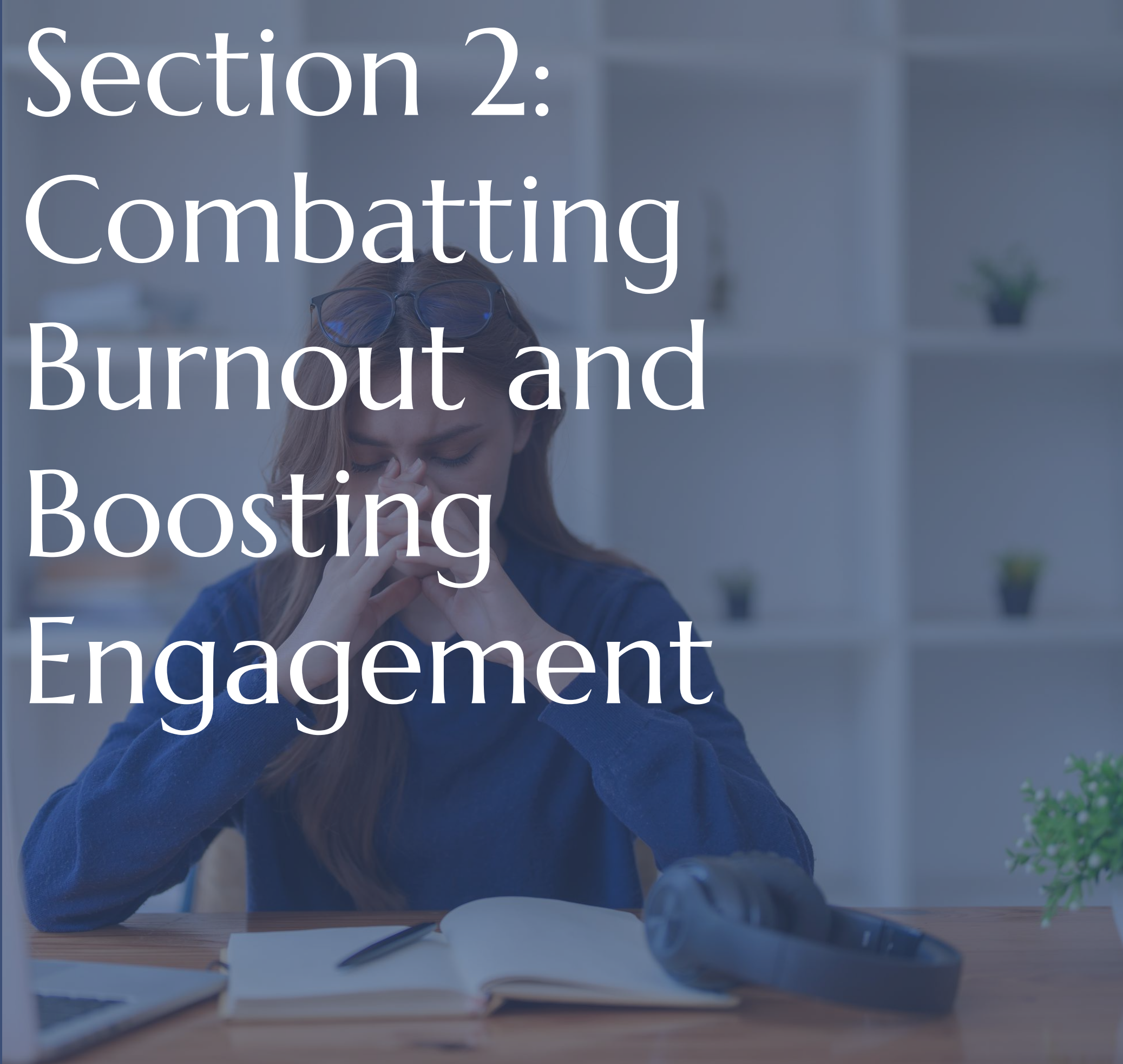
2-Reverse Mentoring:

Technology skills training
Social media insights
Modern patient communication preferences

3-Peer Mentoring:

Cross-departmental knowledge sharing
Best practice exchange
Problem-solving partnerships



A woman with long brown hair and glasses is sitting at a wooden desk. She has her hands covering her face, appearing stressed or overwhelmed. A headset is on the desk in front of her. There is an open notebook and a pen on the desk. The background is a blurred office setting with shelves and plants.

Section 2: Combatting Burnout and Boosting Engagement

*Burnout isn't just about
being tired – it's about
losing the sense of
purpose and
accomplishment that
drew us to our jobs
and organizations*

Causes of

BURNOUT

Administrative Overload

Increasing paperwork and documentation requirements take time away from core work duties

Constant policy changes create additional learning curves and stress

Staffing shortages mean fewer people handling more administrative tasks

Expectation Pressure

Organizations demand higher productivity and metrics

Clients/patients expect more personalized attention and better service

Professionals feel squeezed between competing demands from all sides

Moral Injury

Having to make decisions that conflict with professional ethics or personal values

Knowing the right course of action but being unable to take it due to systemic constraints

Repeatedly witnessing situations that violate one's sense of what's right

Values Misalignment

Personal values conflict with organizational priorities

Mission statements don't match operational realities

Constant tension between what professionals believe is important versus what they're incentivized to do

Physical indicators:

Chronic fatigue
Sleep disturbances
Frequent headaches
Digestive issues

Emotional indicators:

Cynicism about work
Detachment from team
Irritability
Decreased satisfaction

Professional indicators:

Decreased productivity
Increased errors
Poor decision-making
Withdrawal from responsibilities



Daily Practices:

- Schedule (and take!) regular breaks during your day
- Create a "not-to-do" list of tasks to delegate or eliminate
- Set up "focus time" blocks in your calendar

Weekly Practices:

- Hold consistent meetings with key team members
- Ask, "What's Going Well?"
- Plan the following week with buffer time for unexpected issues

Monthly Practices:

- Review personal and professional goals
- Connect with mentor or peer support group
- Assess work-life balance and make necessary adjustments



Section 3

Building a Resilient and Connected Workplace Culture



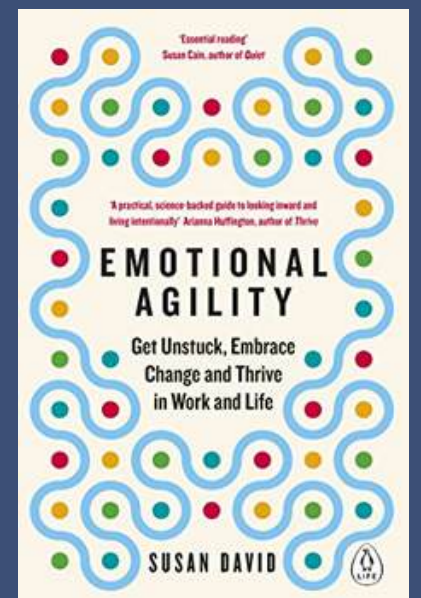
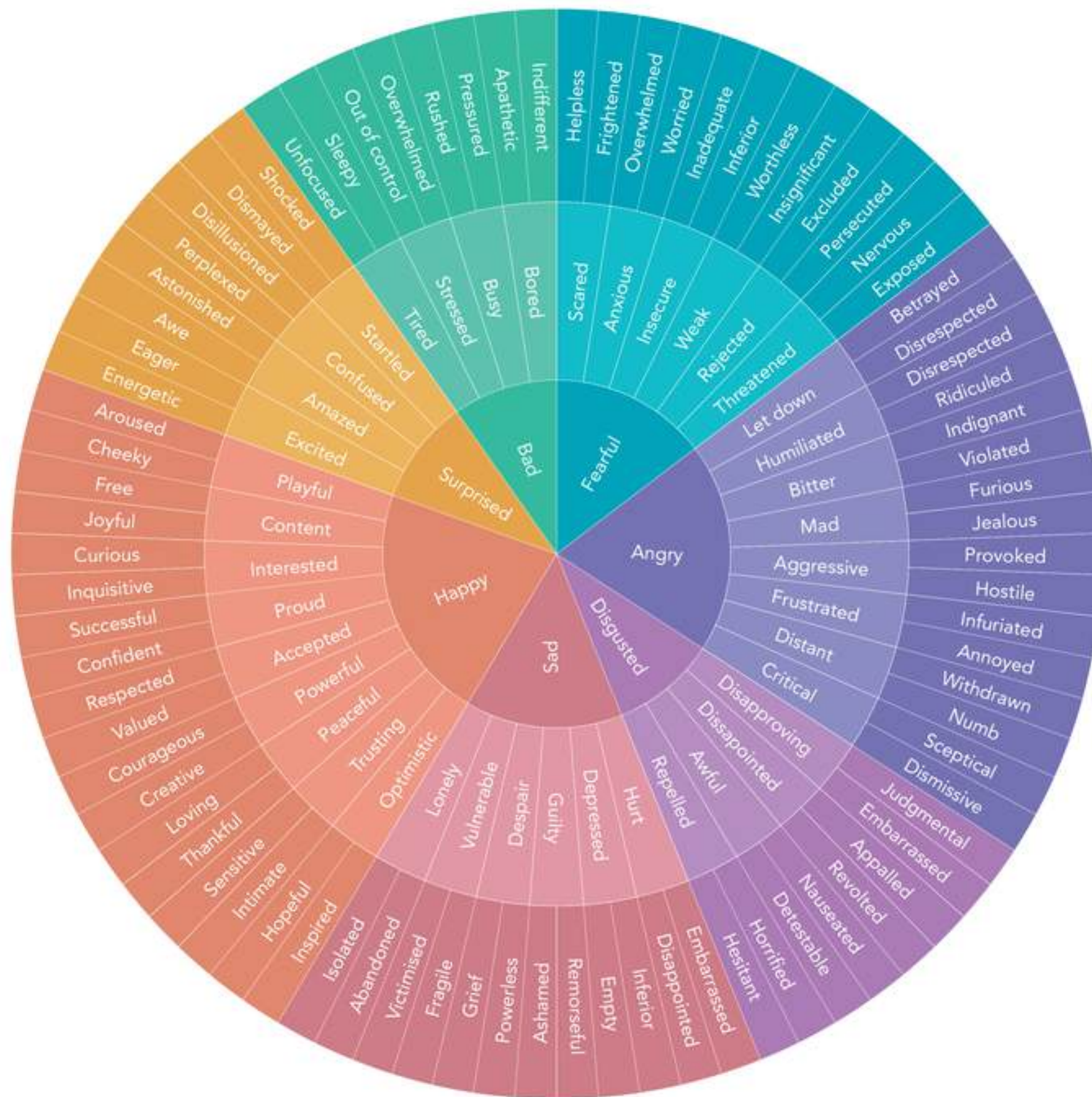
What is Resilience?

Resilience [rə'zilyəns]
NOUN

- ① The capacity to recover quickly from difficulties; toughness
- ② The ability of a substance or object to spring back into shape; elasticity
- ③ The ability to respond, absorb, and adapt to, as well as recover from a disruptive event

Feel Your Feelings

- Check in with yourself regularly
- Name and accept ALL your emotions
- Separate yourself from the emotion

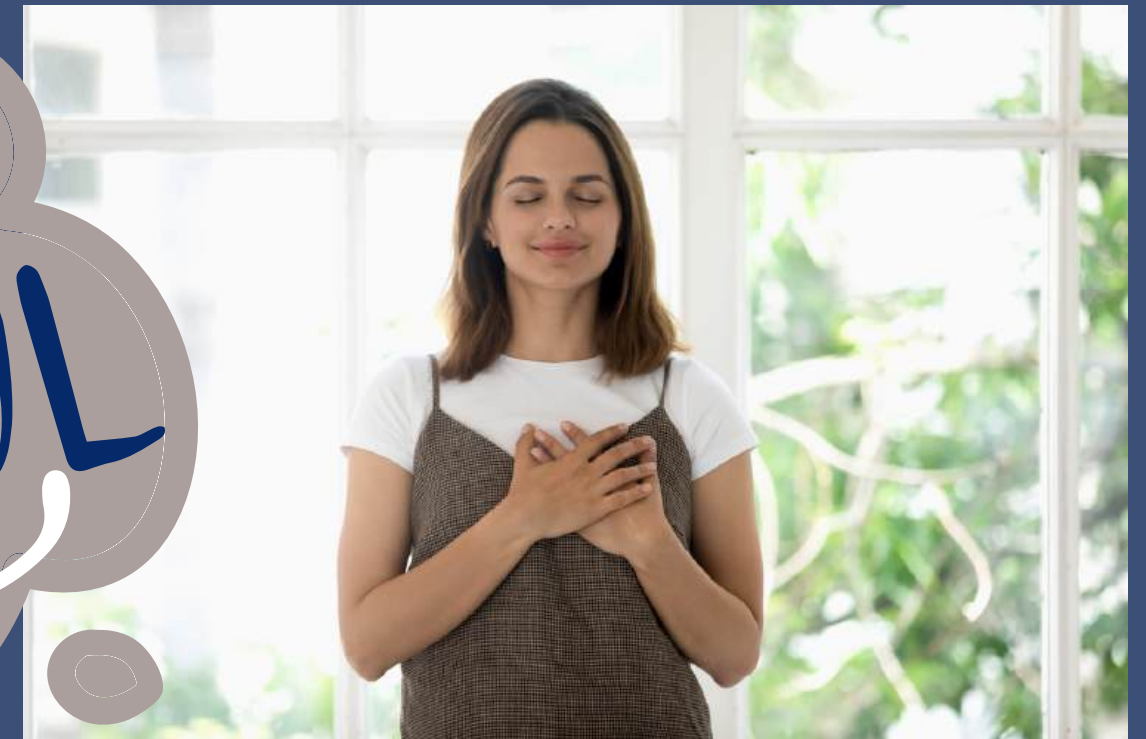


Learn about Emotional Agility –
Susan David, author and Ted
Talk Speaker

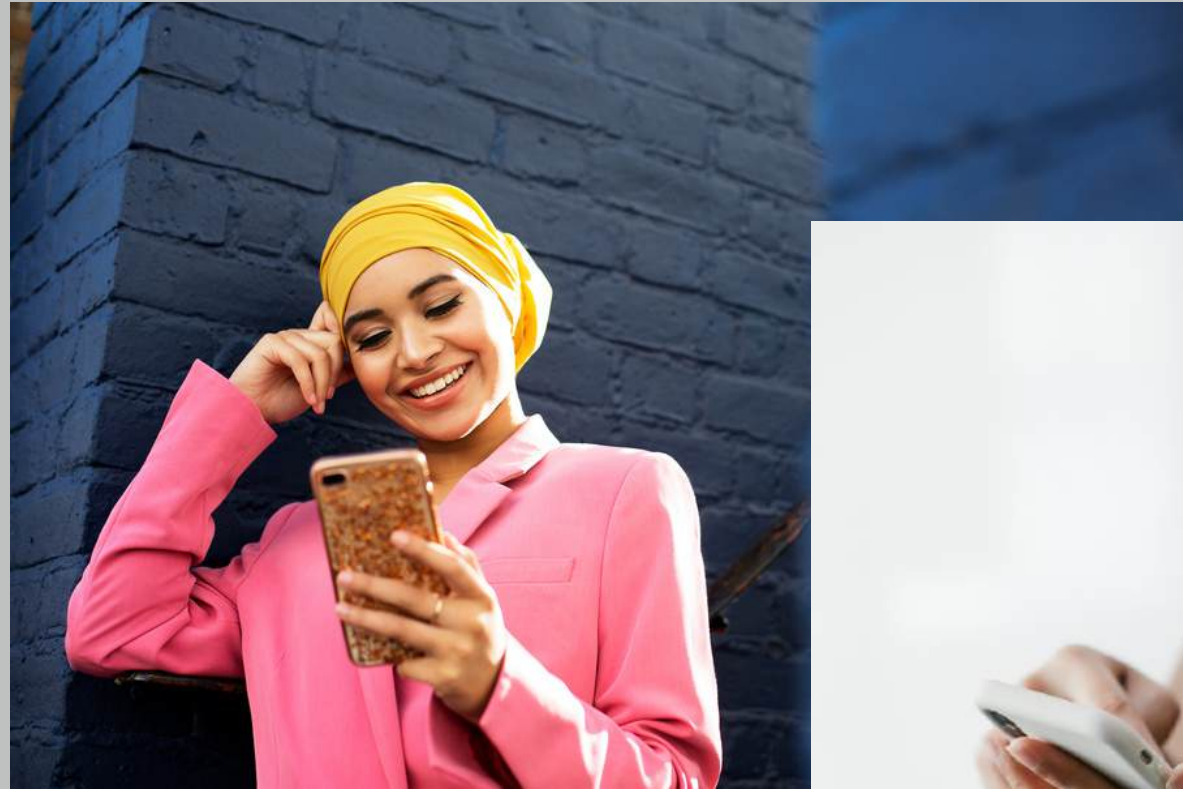
Express Gratitude

Grateful
and
Thankful

Make it prompt,
personal and plentiful



Stay connected



Combat Loneliness

Serve Others



Volunteer

Challenge to Opportunity:

Original: "Another regulatory change to implement"

Reframe: "Chance to strengthen our compliance program"

Original: "Difficult staff member to manage"

Reframe: "Opportunity to enhance leadership skills"

Problem to Project:

Original: "Overwhelming workload"

Reframe: "Opportunity to improve systems"

Original: "Constant interruptions"

Reframe: "Chance to implement better workflows"

Criticism to Feedback:

Original: "Complaint about wait times"

Reframe: "Data point for process improvement"

Original: "Staff resistance to change"

Reframe: "Input for better change management"



Shifting Our Mindsets

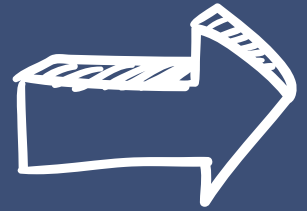
Creating a Resilient Culture Starts with Leadership



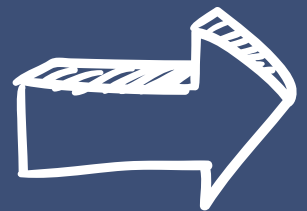
Ways Leaders Create Connection With Their Team

- Ask for feedback – **then act on it**
- **Define** and **communicate** their own values
- **Celebrate** and **acknowledge** life's moments
- Appreciate **intentionally**. One gift does **NOT** fit all.

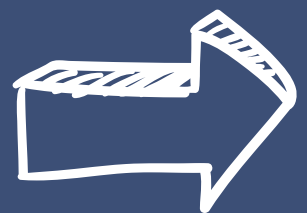
Ways To Create Connection



Build TRUST



COMMUNICATE with Intention



SET SHARED GOALS and EXPECTATIONS

Behaviors That Build Trust



Have an ongoing dialogue about what trust looks like in our department

Being clear about expectations

Being responsive

Not tolerating gossip

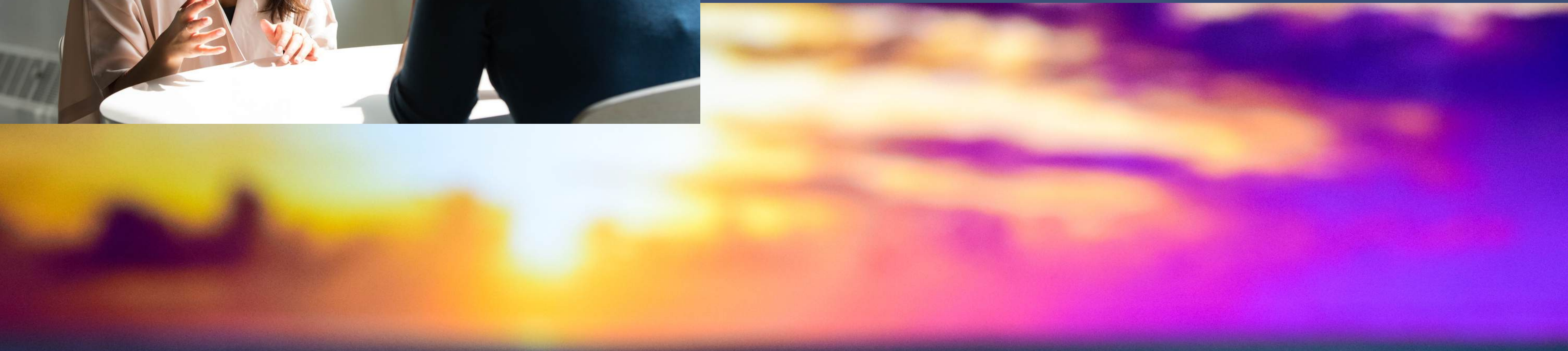
Taking an interest in, and learning about, co-workers

Exhibiting integrity—by doing what you say they will do and being reliable





Communicate with Intention



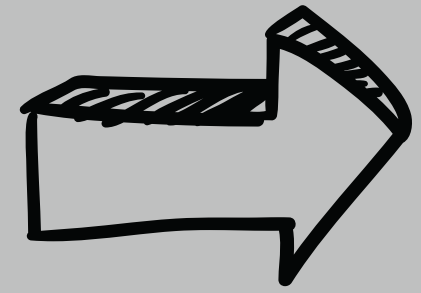
INTENTION MATTERS

Meaningful Conversation Starters to Connect with Others:

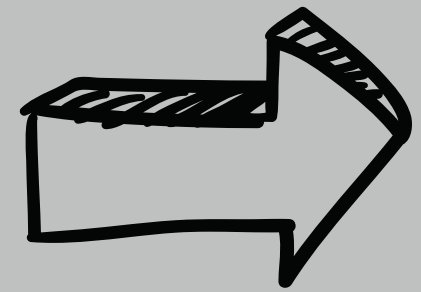
- What is going well?
- What are you grateful for right now?
- What are you passionate about right now?
- What is something you learned recently?
- What is something you are proud of lately?
- What is something you are curious about?



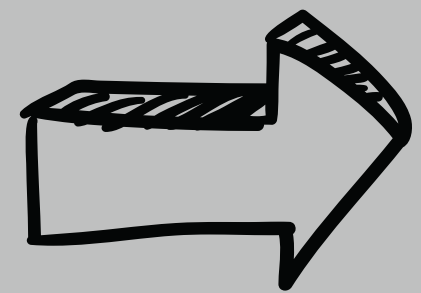
Setting Team Expectations



WHAT Will We Say?

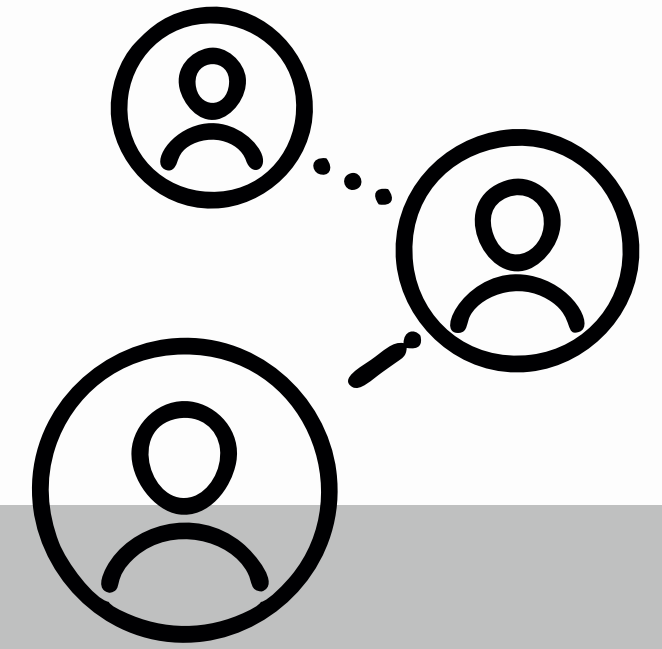


WHEN Will We Say It?



HOW Will We Say It?

Questions To Make Our Connections Stronger



What work are you good at doing?

What work do you enjoy?

What work feels most useful or meaningful?

What work creates a sense of forward momentum?

How do you like to work with others? (synchronous, asynchronous, in-person, remote)

ASK ABOUT Giving & Receiving Feedback

- When you have received helpful, constructive feedback in the past, how was it delivered?
- What type of recognition is most meaningful to you?
- What is your natural response under stress? When you are under stress, what do you need from me/others?
- Anything else that would be helpful for me to know about your preferences and expectations?

Giving Meaningful Feedback

Instead Of: *"You are hard to work with"*



Share your observations:

Use words like *"I noticed, I heard, I observed, I saw, I was told"*

- Keep the discussion about the specific behavior, don't make it about the person
- Stick to facts
- Talk about impact
- Empower them to find a solution

If you can't give a SPECIFIC example, you are not ready to provide feedback



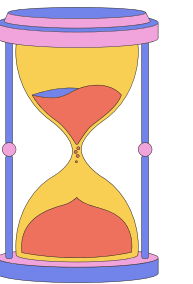
ASK ABOUT Communication *FREQUENCY*



☀️ How often do you like to check in regarding your work, progress? (Weekly, Biweekly, Monthly)



☀️ Do you prefer scheduled appointments or impromptu conversations?



☀️ If I need to interrupt you, how would you prefer I do so?



RELATIONSHIP BUILDING STATEMENTS

* Partnership:

"I really want to work on this with you."

"I bet we can figure this out together."

* Empathy:

"I can feel your enthusiasm as you talk."

"I can hear your concern."

* Acknowledgement:

"You clearly put a lot of work into this."

"You invested in this, and it shows."





Support:

"I'd like to help you with this."

"I want to see you succeed."



Respect:

"I've always appreciated your creativity."

"There's no doubt you know a lot about this."



Legitimation:

"This would be hard for anyone."

"Who wouldn't be worried about something like this?"



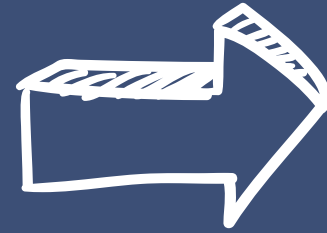
Questions To Make Meetings More Meaningful



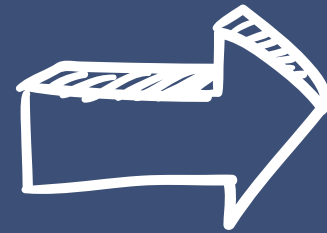
- What is important for us to discuss today?
- Tell me about your biggest obstacle to success right now
- What are you proud of since our last meeting?
- What are you the most disappointed about since our last meeting?



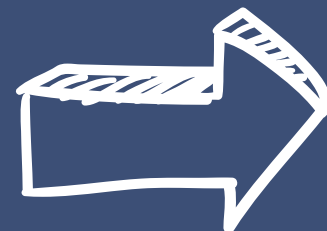
Creating & Celebrating Shared Goals



WHAT Will We Do?



WHEN Will We Do It?



HOW Will We Do It?



Be Intentional About The “Employee Experience”



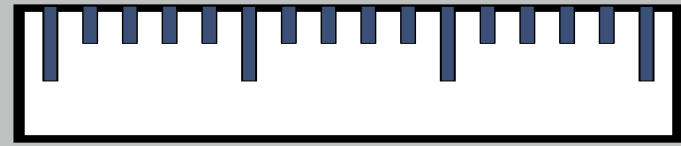
⇒ Reward teamwork & celebrate group successes

⇒ Invest in your employees – financially & emotionally

⇒ Cultivate trust by encouraging open, healthy, candid communication



WAYS TO MEASURE ENGAGEMENT



ANNUAL SURVEYS – Comprehensive sets of questions

PULSE SURVEYS – 5 to 10 targeted questions



FOCUS GROUPS – Great for larger organizations and more complex topics, such as whether to add an Employee Wellness Plan

‘Don’t ask every question under the sun. This is truly a case where fewer, focused questions give you more than asking every question in the book.’



What Employees Ask For

Clear Vision
and Goals

- Opportunities to learn and grow
- A positive culture with no or few toxic behaviors
- Trustworthy leadership
- Having a voice that's listened to
- Recognition
- Compensation and benefits

3 Questions to Help Employees Find Their Purpose



- ✿ What work are you good at doing?
- ✿ What work do you enjoy?
- ✿ What work feels most useful or meaningful?



Section 4: Identifying Blind Spots and Enhancing Job Satisfaction

Prioritize Self-Reflection and Growth

Engage in regular self-assessments and use tools like leadership evaluations or personality frameworks (e.g., MBTI, DISC). Reflect on your behaviors, communication style, and decision-making to uncover and address blind spots. Be open to feedback from leaders and team.

Align Work with Values and Purpose

Take time to evaluate how your role aligns with your core values and the broader mission of your organization. Reconnect with the impact your leadership has on your team to reignite your passion for the work.

Professional Growth Opportunities

- Identify and set progressive career goals
- Pursue professional certifications
- Attend conferences, webinars and in-person events to stay informed and network
- Seek out a mentor or professional coach
- Join societies, clubs and associations
- Develop leadership skills by taking on new projects, shadowing senior roles or mentoring team members

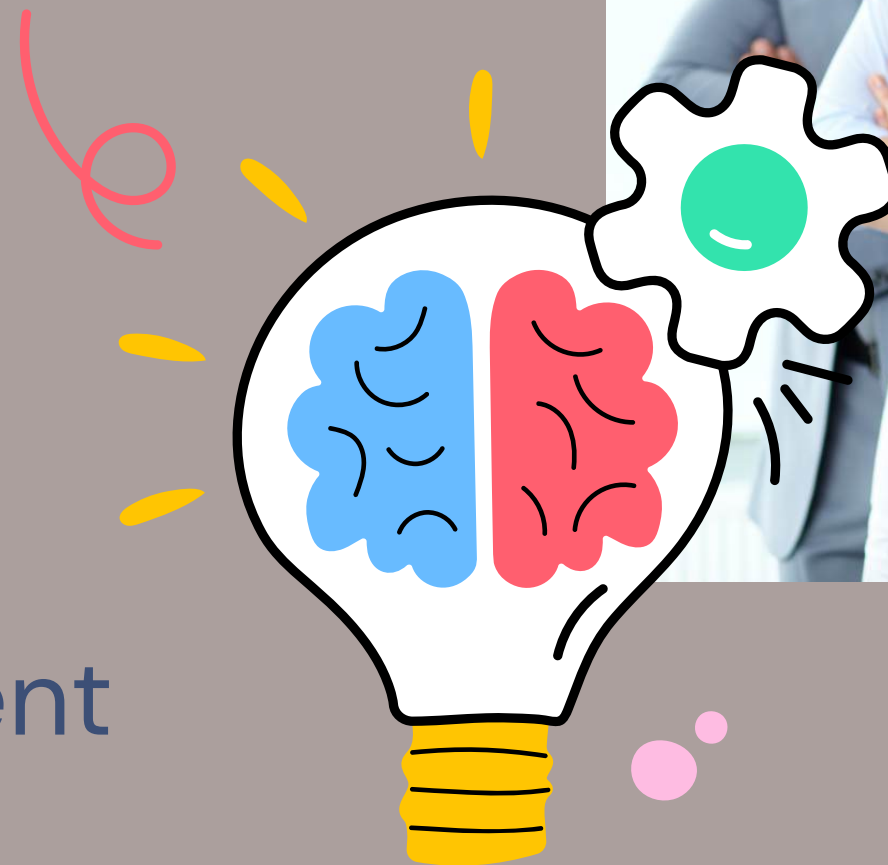
Team Management:

- Motivation techniques
- Conflict resolution
- Performance management
- Change leadership
- HR regulations

Strategic Thinking:

- Problem-solving
- Decision-making
- Innovation management
- Risk assessment

Develop Your Leadership Skills



Hone Your Business Skills

Financial Management:

- Budgeting for sustainability and growth
- Revenue cycle management
- Revenue generation
- Cost control and efficiency
- KPIs/KRAs

Operations Management:

- Process improvement
- Resource allocation
- Efficiency optimization with tech
- Quality and compliance



Healthcare Technology:

- EHR systems, superuser certifications
- Business analytics reporting and tools
- Digital check-in
- AI

Data Management:

- Report building and analytics
- Data analytics tools
- Business intelligence software
- Clinical decision support tools

Improve Your Technical Skills



Adapting to Industry Changes

Regulatory Changes and Compliance

Trend: Evolving healthcare laws and payer policies may require updated compliance and billing policies and workflows

Action Plan: Stay ahead by subscribing to regulatory and payer updates, leveraging compliance software, and attending webinars on policy changes.

Technological Advancements and AI Integration

Trend: Increased reliance on AI for administrative tasks, patient engagement, and data analytics.

Action Plan: Identify areas where AI can streamline operations, look for integration and attend product demos, then provide training for your team, and adopt user-friendly tools to stay competitive.

Shifts in Patient Demographics and Expectations

Trend: Aging populations, demand for personalized care, remote solutions and the rise of tech-savvy patients.

Action Plan: Offer flexible technology options (telehealth, mobile apps) and ensure your staff is trained in delivering patient-centered care.



Staffing and Workforce Dynamics

Trend: Continued labor shortages and increased demand for flexible work environments.

Action Plan: Develop robust recruitment and retention strategies, invest in staff wellness programs and benefits, and create opportunities for professional growth. Consider virtual assistants.

Let's Recap Our Objectives



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Let's Connect!

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