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Unlocking Team Potential: A Matrix Management Approach

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Kanta Deopura, Owner

Cottage Caregivers

Disclosure of Financial Relationships



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Learning Objectives



- Explain a matrix management structure for small healthcare organizations by outlining the specific steps to create manager and task-doer roles across six core operational functions.
- Describe a cross-training program that identifies and develops team members' capabilities by applying the "Get it, Want it, Capable" framework to existing staff roles.



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Introduction to Cottage Caregivers



- Greater Boston Home Care Agency
- Non-medical
- Supports Seniors
- Mid-Sized Agency
- Independent (Non-franchise)

Management & Operations Team



Karen Carroll

President & COO

CNA and Hospitality Professional with background across multiple industries including non-profit, education and government. Advocate for seniors and demonstrated leadership in the community in South Shore

Number of Years at Cottage 10+



Annie Land

Client Care Manager

Human Resources and Hospice background and actively involved in the community in the town of Scituate

Number of Years at Cottage 5



Erin Garside

Client Care Manager

Small Business Background. Actively involved in the community in the town of Marshfield

Number of Years at Cottage 3



Manish Deopura

CEO

Administrative, Financial, Marketing and Sales Functions at Cottage Caregivers

Number of Years at Cottage 2

Market Demographics | Competition



- Population Demographics
 - Growing Population in Eastern MA
 - Higher Proportion of Seniors
- Income Demographics
 - Affluent Area (South Shore)
 - Median House Price (Range by town: \$575K - \$1512K, Average: \$875K: MLSPIN Data)
- # of Home Care Agencies (Private Pay and Others)
 - Massachusetts (Estimated 500)
 - South Shore: Mid Size Agencies ~5
 - Cottage Caregivers would rank within the top 5 agencies in the South Shore area
- Competitive Philosophy
 - Nimble and agile to understand
 - Provide highest quality services
 - Matching Caregiver to Client

Client | Customer Demographics | Services



- Client Types - Typical profiles
 - Memory Impairments
 - Ambulatory Challenges
 - Short-term Post Rehabilitation
 - Age (75+)
- Services Provided
 - Care Services
 - Day, Overnight
 - Live-in Services
 - Respite Care
 - Companionship

Entrepreneurial Operating System

Embrace Positive Changes

- Family Owned and Operated
 - Entrenched within the Community
 - Key and Important Success Metric
- Entrepreneurial Operating System
 - Embrace a Systems Based Approach
 - Office Management & Leadership: Get it, Want it, Capable
 - Quarterly Meetings, Monday Scrums
 - Goal Setting

Change 1: Responsibility Matrix



- Clear Ownership for Each Function with Matrixed Team Members
 - Sales Manager(M): Karen
 - Outreach/Marketing M: Karen
 - Scheduling & Client Management M: Annie
 - Hiring & Onboarding M: Erin
 - Billing & Financial M: Manish
 - Caregiver Management M: Annie

Change 2: Skill Development Program



- Cross Training Approach
 - Formal & Informal
 - Rotate through responsibilities
 - Understand various facets of the organization
- Technological Familiarity & Processes Agility
 - Scheduling Software
 - Hiring Process
 - Marketing

Change 3: Leadership Enhancement



- Enhanced Leadership Capabilities
- Encouragement Team members
- Specialized Leadership Positions
- Broader Capabilities

Outcome 1: Operational Efficiency

- Achieved seamless coverage for all critical function
 - Cross-training
- Reduced response time to client and caregiver needs
 - Distributed responsibility
- Enhanced decision-making efficiency
 - Clear ownership
 - Backup structures

Outcome 2: Team Development



- Three key team members
 - Expanded leadership roles
 - Two additional team members in process
- Increased team member satisfaction
 - Broader skill development
 - Increased decision-making responsibilities
- Improved problem-solving capabilities
 - Across all operational areas
 - Greater technological & operational awareness

Outcome 3: Business Impact



- Maintained sustainable growth
- Operating with a lean office team
- Enhanced service delivery
- Efficient task distribution
- Redundant capabilities

Lessons Learned



- Operational Lessons
 - Benefits of a Matrixed Organization
 - Technology Adaptation
 - Part by Part
- Organizational & Cultural
 - Develop capability through learning
 - Culture of Aspiration

Key Takeaways



- Matrixed Organization Foundational Elements
 - Positive culture
 - Key Metrics
 - Reality Oriented Processes
- Investing in Resources
 - Human element
- Challenges in the Industry
 - Have Fun
 - Need to systematically keep going

Questions?



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