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Cara Silletto

Welcome to the Bridge The Gap podcast. I'm your contributor host today, Cara Silletto. If we haven't met yet, I'm the president and chief retention officer at Magnet Culture, a firm dedicated to reducing unnecessary employee turnover. And I'm the creator of the employee retention ecosystem. So it has come to my attention that everyone is quite busy. Would you say that that is you?

Of course it is. So beyond my retention expertise, I have also found that folks come to me because I am a super organized person. Now I will tell you, I've not always been that way. It has come mostly out of necessity. And so today I thought I'd share some tips and tricks of how I have kind of foolproof my business, my leadership approach, my communication, and I wanted to see if I could help save you some time.

Okay, how can I help leaders think differently about the way we communicate with our new hires? Our team keep everybody engaged. Change the way that we have our daily staff, huddles and outreach and check ins with our folks. And I thought if I could help even just a few of you who learn some tips and tricks of how to be more organized, how to be more proactive rather than reactive.

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Just some things to help lighten your load that will actually help you be a better leader and ultimately get us to better retention. So today I'm going a little bit more around your communication and your leadership approach and really focused on, like I said, being more organized, more proactive, more strategic in your way of working with your team.

So let me give you a little backstory on how I got here. I was that kid who, when my mom gave me chores in the morning and said, after school, clean up the kitchen or pull the trash can in or other things. She'd get home from work at 5:00 and say, why didn't you do that? And I said, forgot, sorry.

And my mom, if you've heard any of my generational stories, you may know my mom was quite the pushover who was not a super strict mom and kind of let me get away with whatever I wanted to get away with. And so I didn't get in a lot of trouble. Now some of you are rolling your eyes because you did get in a lot of trouble if you didn't do chores, but that just wasn't my upbringing.

So when I went away to school and then I got my first big girl job at a senior care association, my mom sat me down and said, listen, I haven't really prepared you for the real world as best as I should have because you will get fired. You will get fired if you tell your boss, sorry, I forgot.

I didn't think about it. I ran out of time. It slipped my mind. And so she said. You better figure out a way and figure it out quick. At this first big girl job of yours to where you are not going to forget

to do what your boss tells you to do. Whether it's you need to do something monthly, you need to do this one thing today.

Right now. You know, I also said I could never be a server in a restaurant because if somebody said, can I get some ketchup? And as I walk to the kitchen to get their ketchup, someone else said, hey Cara, how was your weekend? I would forget about the ketchup. So that's how I'm wired. Very pretty. Terrible short term memory like that, that I would forget why I came in a room and where I was headed.

So I decided to rely on post-it notes, and I became a post-it note queen at my first job. Put them everywhere my desk, my laptop, my door, my purse. I put post-it notes everywhere. In fact, I use so many post-it notes that our CFO, I'm embarrassed to say this. Our CFO at the association banned post-it notes as a organizational expense.

Right? It wasn't that we couldn't have them. She just said, I'm not buying any more post-it notes for you all, because I wasn't the only one going post-it note crazy. And so she banned them from us. And luckily she was so sweet. She did, a few months later, get all of us some post-it notes for Christmas as her own personal Christmas gift.

But I just say that that was kind of my journey of not being organized to trying to get organized, to now I have systems, I have software, I have checklists, I have calendar reminders. I have all the things in front of me to help me foolproof myself as a leader, as an organizational, you know, owner and and department head for different folks.

And part of that also came because some of you know, my team members, my trainers, my logistics team, and we had 14 maternity leaves on my team in ten years. So that meant which you all might relate to that with just staff turnover or people leaving and coming back or vacations and maternity leave, different things like that. So what that forced us to do was get organized.

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We had to document who did what and say, well, while Brittany's gone, we need Abby and Brandi and Cara to pick up those pieces. So we had to list out what everybody did, how often they did it. How did they do it? What were the passwords to get to the system or or to that information? And before we knew it, over time we had created these handbooks, not just like compliance and policy handbooks, but really processes and foolproofing.

You know, some of you probably around your building, you have a laminated sheet that says step one, step two, step three, step four of how to do those things. That's another way of doing this in more of a community setting around the building. Maybe you don't want to have handbooks that are word documents, but instead to foolproof both folks out on the floor.

Okay, so I have now a million ways that I foolproof my work processes, my brain and myself to make sure that I get done what needs to be done for my clients, my team, my family, my business, all of those things. So we're going to talk more about some tips and tricks from the organizational level. You know, maybe getting the right kind of software all the way down to the individual level leader, you as a human, what kind of reminders do you need to set as a leader for your team, or a mom or dad or volunteer or church member or whatever is all on your plate?

How do we not let those slip through our fingers? Okay, now I use this word, foolproofing a lot. I also love the word rhythm, like creating a rhythm for yourself. And when I say foolproofing, it actually doesn't have to be perfect. But if you can let your systems and your calendar tell you what to do when, it just helps relieve your brain.

We have so much in our heads now, and we don't have to keep all of that up in our head. In fact, I call some of my systems my satellite brain because I get to brain dump and get it out of there, and then make sure that it doesn't fall through the cracks, because that calendar reminder is going to keep me in check.

Okay, so we just need some checkpoints, some reminders, some micro steps of how to get us to the finish line. So let's let's start with this memory conversation. Now, I have been through several things in my life. And maybe you have, maybe you haven't. Where my memory was not that great. I've gone through phases with brain fog. You know, pregnancy brain is a real thing.

I am 44 years old, so now I'm starting perimenopause and have those brain issues. And sorry if that makes you uncomfortable, but it's a real thing that you start to get those hazy moments of brain fog and that happens at different points in our life. So with aging, right, we all go through different points. Or maybe you have some other health issues, or you had surgery and you're coming back off of pain meds or even being off on vacation, and you have to get yourself back in work mode.

We all have times when it would be ideal not to rely on our memory so much for everything that needs to be done. So one option carry a small notepad around with you. You know, some people really like paper and pen. Get a small notepad fits in your pocket and carry that around. So if somebody asks you to do something or you remember, I need to check on that, you can literally write it down.

Post-it notes, of course, are still available and still very popular with some folks. You could put it on your calendar. I'll do that if I've got my phone with me, which I always do, I'll pop it in on my calendar as a to do item. Or I might email myself if it's an idea or some information I want to remember and put on my calendar.

Later, I might email myself. And then also, most of you probably know this, but I did not know that you can text yourself. I never knew that until about a year ago that I can actually put my number in to the text and I can text message myself. Now, you got to be careful with text messages to make sure that you mark it as unread, or even with emails as well, if it still needs to

be done, because if you don't, it could fall through the cracks and you may not come back to it, but any of those tasks can get the information out of your brain and onto a sheet of paper, a document somewhere that will help you come back to it later. When when you're back at your laptop or when it's the right time. Okay, now from a business standpoint, foolproofing often means putting the right systems in place for your team members, especially for new team members who might skip a step of a process because they just haven't done it.

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It's not relegated to their memory just yet. And also, a lot of people are frizzy. And in fact, there's a book out there called Checklist Manifesto that talked about how even people who've been doing something for 20 or 30 years, like surgeons, was one of their examples. Even people who have done that same surgery over and over and over, it was still best for them to use a checklist and not memory, because less mistakes happened when they literally had to check the boxes one, two, three, four, five, six, seven.

And so it's not about how good you are, how smart you are, how perfect you are. It's about relieving that brain pressure and making yourself as foolproof and accurate as possible. So today in some of our leadership classes, we teach, especially when when we're talking about new hires coming in, forget memorization. You know, back in the day, it used to be that people had to memorize how to do their job and different software, you know, all these different parts of our, our daily job.

We just had to know it all in our head. And we can't do that anymore, particularly with new CNAs coming in all the time. That's why we need those laminated cheat sheets outside of each residence room, or at each kiosk, or at the nurse's station, you know, and on different equipment. That's why we do that, is to help them understand that step by step process without having to memorize it.

Especially if somebody only does a task or uses a piece of equipment once a week or once a month. It would take a long time to really, truly memorize all the steps needed. So let's label as much as we can. Label label label label things with different steps. Label draws what's in each draw me just so people can find it, but also so that they put it back in the right spot.

Because if I'm new and I find this stapler after going through six different drawers, I'm not going to probably put it back in the same drawer that I found it from, because I don't remember which of the six drawers it was. Right. I'm just going to put it back somewhere because it was in that general area, which then makes the next person have to hunt for it.

So we don't need to waste anybody's time. We should just label the drawers, the cabinets, the supply closet, all of those kind of things. Even around our buildings, I have found that some communities still do not properly or effectively label the wings and the the different units and different floors in the elevator. What is where. That's great for customer service, for people finding what they need to find if they're a visitor.

It's also great for new hires to not feel like dummies. Like, I don't know where that's at and I have to roam around for a while. It's even great because sometimes things get moved and we can label that and tell everybody, hey, we've moved this and we've labeled it. Whether it's signage or physical diamond labels. You know, I love my diamond Labeler, by the way.

Even in my home, we label everything that we can that that might need to be. So just creating that mindset of let's not depend on memorization for folks is really, really helpful. All right. So we want to also create those foolproof checklists anytime we can. Here's an example I was teaching a class not too long ago down in Atlanta.

And one of the managers said, well, I think it's ridiculous that I asked a new hire to take out the trash, and they took the bag out of the trash can and walked away, and they took out the trash. But they didn't put a new bag in the trash bin. And this person just could not get over how ridiculous that was.

Thinking they should know better. I shouldn't have to tell them that, but I think I may have mentioned this on a previous episode that we talked about communicating the expectation. Maybe that person didn't ever have to take out the trash as a kid at home. That wasn't their chore. And so they don't think about the follow through on that and somebody else in the room.

Here's my point today. Someone else in the room said, yeah, we had that same problem. So we put a laminated card inside the trash bin that said, if you can see this card, please put a new bag in this bin. And that way it kind of foolproofed either the person doing it or if that person missed it, the next person who saw the card was like somebody didn't put them in in, or didn't put the trash bag in the bin.

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So I'm going to take care of that, right? So we can foolproof folks in that way. Now, I naturally have learned that I am 50/50 left brain, right brain. So I love the creative side of my work. You know, speaking at conferences and training and building new programs. I love that as much as I love a spreadsheet and a checklist and a process and a system.

Okay, so I know I'm kind of the oddball out here because most people are either super organized naturally or they are more creative and more there's benefits to that of let's wing it, let's just figure it out where the spreadsheet folks don't like to wing it. They're not good in that situation. They need prep time. So there's pros and cons and strengths and weaknesses to any natural style.

But something that I learned was actually gain more freedom, more relief, more peace of mind. When I am in a process and I am disciplined to that process. So let me say that kind of another way. A lot of systems, people think in checklists, a lot of creative people do not. And creative people think, oh, I do not want a system, do not tell me how to do it.

And then I have to do it this way or that way. But then those creative managers are the ones who come to me and say, oh, I'm so overloaded and I just have a million things on my plate. And when I ask them about their processes and their systems and their checklist there, oh, no, I don't want any of that.

But I have seen with my own eyes as I've helped people put those processes and checklists in place, that when you create the checklist and follow the checklist, that's the harder part. When you create it and you follow it, you actually end up with more free time and more peace because it told you where to be, when, what to do and how to do it.

And you didn't have to carry that mental load. Okay, so process plus the discipline of using it equals the freedom and peace that you are probably looking for. Okay, so just something to think about. I know you're going to push back naturally that that makes sense. But I'm telling you I've seen it with my own eyes, with my own life, with my own business.

And it can absolutely free up that mental load and that extra stress and pressure that you have. All right. So instead of thinking as an HR leader, for example, every day you're wondering, what should I work on, right? Should I work on our new onboarding plan or should I conduct some stay interviews right now? Should I make these phone calls to schedule interviews?

Right, like you've got all these things all at once that feel like they need to be done right this second? Instead, what if you had a plan for prioritizing your tasks? Now, the model that I work with, this. This acronym does not make a sexy word. It's dwm QA, but I don't even think about the acronym as much as I think.

What do I need to do? Daily. Weekly? Monthly? Quarterly? Annually? That's it. Okay, it's as simple as that. What do I need to do? Daily. Weekly? Monthly? Quarterly? Annually? That's the d a if I write it out as an acronym. Okay. And once we figure out how often we need to do each of the tasks on our plate, for example, you could take your job description and say, okay, in my job description, if I broke this down into tasks, what do I need to handle?

Daily, weekly? Monthly? Quarterly? Annually? That again relieves your brain of that stress and pressure and sets a tone, sets a timing, sets a rhythm for when to do those things. Now, I'm not ignoring the fact that a lot of your job is fighting fires every day and handling this and that, but I will tell you, fighting fires will lessen, I promise, I promise, just stick with me.

That amount of firefighting that you have to do the reactive oh, I have to deal with this now. Oh this is an issue now that will lessen over time. If you are more proactive about handling the projects in advance of the deadline, for example, handling conflict before it gets out of hand, you know, handling staff dynamics and new hire team building.

If we can handle a lot more of that communication and proactively work with our team and on our projects and tasks, if we if we shift to more proactive, there will be less reactive firefighting

over time. Now, that does not happen overnight, but I promise it does get under control over time. So let me give you some examples here.

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So for example, daily most of us are doing a staff huddle every morning or every shift even. And so what if we used an agenda behind that? Okay. And I think we probably kind of wing an agenda now like hey, what's everybody need. Do we get any new admissions, any issues. That's kind of the agenda right now.

But what if we made every single day we had a written down agenda that is not forgotten? And let's say this is what my team does. For example, we start with the good, the bad and the ugly. We call it GBU, okay? The good, the bad, the ugly. It's just chit chat. Now, some people might say that's a waste of time.

I say that is team building, okay? And we just say, how was your weekend? How's everybody doing? Hey, Shelly, I saw your dog has the cone of shame on. Is your dog okay? You know, did they have surgery or. You know what? What happened. Right. And we can kind of talk just for a minute, two minutes, five minutes, whatever you have available.

But we start with chit chat and we call it, we title it on the agenda, the good, the bad, the ugly, because people like to share what's going on in their lives. And the value of that time is team building. Okay. Don't discount that as a waste of anybody's time. It's really helpful, especially if you've got new hires looking for work friends and trying to find some commonality with their peers.

Okay, next on the agenda is company updates. So we talk about anything company wide that's going on policy changes, system changes, any of that. And that right there you all is change management okay. That is helping you get in and communicate out that any changes that are company wide. The third item on our daily huddle is the department status.

So what's going on on our team, on our department, on our unit. That's going to be collaboration and updates, communication, making sure the left hand knows what the right hand is doing. That's where your new admissions comes in, things like that that you're already covering. And then we end each daily huddle with who needs what. What do you need from me?

Is there anything broken needs to be fixed? Is anything an issue that needs to be resolved, and that the value of that part of your agenda is support is ongoing support? Because if you come into a staff huddle and just say, well, here's what's going on and here's the updates. And so team go have a good day. And you haven't even given them a chance to say, well, I could use help over here or I have a question about this.

Right. So you have to end every meeting kind of with a support question of who needs what, who needs what from whom, or extra equipment, extra training, extra anything. All right. So

that's an example of just having a set gender. Remember good bad ugly company updates department status. And then who needs what. It's just for little items. But that covers team building change management communication collaboration support all these pieces that we know we need to be showing our team right.

We need to have better change management, better team building, and we have to do all of that in a micro way. Micro team building, micro collaboration, micro change management. It's all the time we have. So from a daily standpoint, really making sure that daily and weekly you have good agendas for every single kind of meeting. Okay, so back to daily, weekly, monthly, quarterly, annually, weekly.

We want to set reminders on our calendar to thank staff, show appreciation, recognition, also to check on new hires. So if you don't have that on your calendar as a recurring reminder every week, even a few times a week to check on your new hires and thank your staff, definitely pop that on there now. Okay, now monthly and quarterly, you're going to set your four quarterly focus areas for projects.

You know, what we teach is from a retention standpoint, we have a retention roadmap. And so when a company is very serious about reducing turnover and they're making retention a priority, we're going to set quarterly retention focused goals of revamping onboarding, improving appreciation and recognition, whatever those are. We're not going to work on them all at once. That's not sustainable and realistic, but instead we're going to create quarterly kind of goals or quarterly focus areas.

And then under that we have monthly tasks that need to be done. So if your quarterly goal is to revamp your onboarding checklist, for example, and maybe the first month in in July or August, whatever your first month is to review the checklist you have now and look for gaps and see what's working and what's not. The next month might be to talk to people, new hires that came in recently and say what was missing, what would make this better?

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Do some research and idea generation around how to improve it. And then the third month could be update your checklist and start to use that kind of pilot that out. So there would be the three monthly tasks underneath the quarterly focus area. All right. Now annually you're probably going to have like create your budget or finish your department's budget annually.

That's something you know, comes every September, October or, you know, aligned with your fiscal year. And so throughout the year, you could have some other items on your schedule that once a year you review the way you do that, you review a checklist, a process, a template, and you tweak the approach on that. Okay. So if you think about what are some of the tools you use, some of your ongoing templates, and then each month you could pick a different template to take a quick look at that template and updated or check on it.

You know, it might not need a revamp, but just kind of check on it so you can tweak it and make sure that it's up to date. That way it doesn't become a fire later that oh man, I haven't checked on that in three years. We haven't updated that. Instead, if we take these little micro proactive steps and set those reminders, then it isn't as big of a deal down the road.

We don't get as far behind. You want to mark your calendar for different things. You can put those daily huddles. You can put the agenda right in the calendar invite if you're if you've got those blocked on your calendar, if you're doing weekly check ins with your staff, you can also have a little agenda there of what are some questions to ask?

Now, if you followed my work for any length of time, you know about Magnet Vault. Magnet vault is our hidden treasure trove of downloadable resources. And there's one in there called the Check In Checklist. So you can grab our sample questions about of that check in checklist and put it on your calendar right there. So when you say check in with new hires or check in with staff and thank your staff, you can put little reminders in that calendar description so that you have it at your fingertips.

Okay. Now also in the vault is that retention roadmap that I talked about earlier. It's kind of a calendar that shows annual goals, quarterly focus areas and monthly tasks. And you can go download that tool if that is helpful as well. All right. Now you do want to block time on your calendar for those monthly and quarterly tasks that need to be done so they don't sneak up on you, especially if something has an actual deadline.

Okay, now another kind of benefit of thinking ahead and strategizing is it helps you to avoid shiny objects. Like, we could do this, we could do that. How many times do you go to a conference? Do you come home with like a hundred ideas? Then are you going to implement any of them? Not unless you put them on your calendar, and you don't have to put them on your calendar.

At the same time, you could take your ten favorite ideas and put one each month on your calendar for the next ten months until the next conference to look at that, to analyze that, to implement that. Don't try to do them all at once. But you could set those items out over time. And that way, you know, in November you're like, I am working on thanking my people more and really getting better at that kind of naturally and more repetitively.

I'm going to work on that. Well, what I like to say is I'm not going to write my next book right now, okay? I have a book and I have little mini books, but I'm I'm not in my book writing era. I'm in my podcasting for Bridge the Gap era. This year I'm doing a monthly episode, and so that is my content creation.

And I don't have to beat myself up over, oh, I'm not writing a book right now. I should be writing my next book right now. Nope. I'm focused on this task, and so you can think of it the same way of right now I am in my recognition era. I'm going to thank my people more. That's what I'm going to focus on.

Yes, I know I should also be revamping my onboarding and checking that checklist and doing this and doing that, all these new ideas. But that's not need that's not needed right now. That's for a different month. That's for February. That's for March. And if you kind of separate them out on your calendar or in your roadmap that way, it again alleviates this pressure.

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You all of having to do and implement everything right now. You can do that over time and get to it when you get to it okay. It helps you also work on your business, on on your leadership approach instead of just in the business every day that you're you're actually being proactive and thinking strategically. It also helps you to not stretch yourself too thin of trying to implement all ten things or all hundred things all at one time.

Now, I do need to put a little asterisk here, because a lot of you listening right now are saying not the one putting too much on my plate. Its corporate group, right? It's my boss. It's my home office that's pushing too many priorities to me. So I will say that writing down everything that's asked of you, and even putting it on your calendar is a great way to communicate to leaders at your organization of how full your plate really is.

Because I have even seen people say to their boss, look at my calendar. Is there anything on this calendar that I have blocked out? Right? Everything from checking in with my people, being in meetings, finishing this project you told me to do right? If you block that on your calendar, you can clearly show them there are not enough hours in the day for you to put more on my plate.

I am already doing the things that you've told me to do, and so it it allows you to have a better conversation with your corporate leaders who are making these additional demands to show them that you're maxed out, right? You're maxed out because we don't want to push you away by putting even more on your plate. And that's a way to have that effective conversation with folks.

Now, on the flip side, if you are a corporate leader and you are making these demands of your community leaders, which I see this all the time to especially I've been doing some new consulting work at the community or I'm sorry, at the corporate level. And I'm seeing folks that have 50 plus initiatives going on at one time, which is just not sustainable, right?

So if you are a corporate leader making these decisions and setting these initiatives forward, you can also use the quarterly and monthly roadmap approach to to lessen the load on your communities. Now you're going to realize, oh, we can't get everything done this quarter. But but it really shouldn't be pushed on folks that everything needs to be done this one quarter.

So you can create a more realistic quarterly and monthly roadmap for your folks, whether it's a retention roadmap or just all the initiatives across your company, IT and AI, and quality and

clinical outcomes, you know, those kind of things. But we've got to make sure that it's realistic for your communities to roll things out at a reasonable pace.

Okay. So we actually talked about this in one of my earlier podcasts this year about analyzing capacity for your folks. So I've got a whole conversation there about workloads and job descriptions and pruning and and all of that. So go back and listen to that if you missed it, because I know it's easier said than done to do all of this, but I'm actually seeing more senior leaders burn out than ever before because of all of these initiatives.

And so much of it is company induced. The companies are kind of doing it to themselves, and then they call me and wonder why all the leaders are quitting, when in fact they, the company itself has just put too much on their plates. So we have to make sure that we are not doing this to ourselves, kind of shooting ourselves in the foot by putting too much on our leaders.

And we need to make these roadmaps and set true priorities with a realistic time frame. Okay, so let's go back to when you're busy and when you're setting your own priorities for the day. Okay, let's go back to something we can control. Let's talk about a few things we can do differently. So first up meeting agendas are critical.

Eye mentioned that earlier. And I would say for any kind of meetings that you have cry to set an agenda for that and to stick with it. And you could change it over time. You know, we always draft something and then we tweak it over time. Every single week we have a sales meeting, we have an operations meeting, we have staff meetings, we have a finance meeting once a month, you know, and there is a set agenda for those so that a we don't forget to talk about something that needed to be talked about.

And b, we have a place to put items and issues before the meeting. If I think, oh, for the next finance meeting, I want to talk about this. I don't have to keep that in my head. I don't even put it on a post-it note. I go put it in the agenda for that meeting. So ideally you would have shared digital agendas for this.

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And there are systems out there that you can use or even just having a collaborative type of doc. In fact, I've switched over away from Microsoft Word and Excel over to more Google Docs and Google Sheets because multiple people can be in that at the same time. If you need to use something very, very basic, like a spreadsheet.

Okay, now my husband and I, we even use systems like Trello, which is a free app. We use that for our ongoing shopping and to do list at home because we can both see it. If you download the app and you invite other people into it, you can both see the app and I can even put something on the grocery list as he's driving to the store, because by the time he gets there and opens up the app, he will see that I added milk to the list and he'll be able to get it instead of, you know, a handwritten kind of on the side of the fridge type of list.

I can't add to that once he rips it off and takes it with him. But a digital list, you can do that. And so we've also figured out that having this agenda means we don't drop any balls. We're constantly adding the issues to that list and may get moved to the next week, because we didn't get to all the issues that were on the list.

But we're not going to forget about an issue because it's on the list and we don't ever think on our team a week or two later like, oh no. Did anybody take care of that? Did anybody get back to her? Because we put it on the list and it doesn't come off the list until it gets taken care of.

All right. So it just helps us keep things out of people's heads and creates that satellite brain that we can all operate from. So it is exhausting if we try to, to keep everything there. All right, so here's another tip. I ask my team to keep a list for Cara at all times. So whether they do that on Trello, you know, they can have their own board spreadsheet or a post-it note.

I don't care where it's at, but they have to keep a list for Cara. And what that means is any questions they have, any updates they have for me. FYI, they keep a little ongoing list for Cara so that when I call them or when we have our next touch base meeting, they can batch all of those items at one time.

Keeps my inbox clearer because otherwise they would be constantly emailing me. I have a quick question. I just wanted to let you know this. You know they would want to email me or stop me in the hall about every single thing. And so if you can get your folks to handle non time sensitive items with a batched list, that can be really, really helpful.

All right. Now let's go back up to the executive level for a moment. Because if your company does not have a management system or team communication software and system available to your leaders, please consider putting that in place. You know, a lot of folks use Asana Monday Basecamp. There's tons of systems out there. You may even have something else that you're working with, but the left hand needs to know what the right hand is doing, and especially if you have turnover.

I've seen this happen like an HR teams where an HR leader is working on a project and then they quit and the next person really has no idea where they were at or where to pick up, where they left off, that type of thing. So if you have a system like we use Monday. Com, which I love and I can tag people in it, I can assign tasks to them, I can tag them with an update and just say, hey, Abby, wanted to let you know I took care of this or this person has a question.

I will say almost every other industry outside of health care operates in this way. They have a team management team communication system that everybody who has projects maybe not like CNA level, but every department director, every manager has access to the system to see what they need to do, what they've been assigned, who needs what and to communicate within the system.

All right. So you want to make sure that you're looking into some kind of task management and team communication system. Because otherwise it's in everybody's own head or in their own computer. And we've got to make sure that we're more collaborative than that moving forward. Okay. It very much reduces the time you have to spend in team meetings and emails back and forth, all of those things.

Okay, so now let's get back to some more individual tips quickly. I want to mention inbox management. So if you have not already switched to just having a one folder, please do that. You do not need to. It has been proven. Now you do not need to have different folders in order to go save your emails, because the search function within email has gotten so good, especially because a lot of you have AI tied to that.

40:20 - 45:16

Cara Silletto

Now you can you can find what you need later without spending all the time putting different finished inbox items into their own folders. So I'm not saying you shouldn't have folders, but a one billion folder is really good. Then you might also want to make a reader watch time folder. I like to put newsletters there, articles there, podcasts there, and then when I'm sitting in the car line or at a doctor's office, or maybe in the morning when I wake up and I don't want to get up yet, but I want to be productive, I'll start reading those newsletters and articles as well.

So just those are kind of the two big folders I recommend is to have a done folder and then a read or watch time folder. Then you can kind of manage everything else out of your inbox. There's more advanced ways to handle that, but if you're not already organized in that way, that's a big time saver. Also, with calendar management, as I've mentioned a few times, I highly recommend having recurring reminders on your calendar.

And if you happen to use Google calendars, you can also set tasks in your calendar. I think outlook has a very different way of doing that. You can check into it, but if you're in Google, you can actually set tasks instead of events on your calendar, and it will make you check the box when you're when you're finished, which is really nice.

So that's very helpful. So I know I get some pushback here, but Cara, if I put all these reminders and tasks on my schedule, I'm just going to get this year and more behind. Nope. Now I laugh. I say that because you just at first, maybe you might be a little overwhelmed by all the reminders hollering at you, but the more proactively you check in with your staff, and the more proactively you properly train your new hires with the foolproof checklists.

And you're working on projects ahead of the deadlines. When you put those reminders on your calendar and you're working ahead, you will actually feel relief over time because you won't have as many fires to fight. All right. So that's kind of where we started. And what we talked about earlier is switching from reactive to proactive, switching from, you know, over to resolving and strategizing things ahead of time will benefit you as well.

In fact, I've seen this happen. I've talked to several administrators who are just rock stars. Right. And it's because they are more organized, they are more proactive, and they have even coached and mentored their department heads to get more organized and become more proactive. And then it relieved all everybody's plates. Over time, there was a lot less scrambling.

Their buildings actually saw better metrics. Over time. They had better retention, better clinical outcomes, everything, better financial metrics and outcomes as well. And they tend to be those rock star administrators because they got the building in order. They they shifted from scrambling over to being more proactive, which is awesome. Now we do get behind even a rock star or someone super organized is going to get behind, especially when, for example, we go on vacation, right?

We have to stop and go on vacation and before vacation and after vacation we tend to be overloaded. So here's a few tips for you when you do get underwater. All right. And some of you, this might just be where you're at now. In a good place to start. So first make your today. List of five items no more than five.

So grab a post-it note. What do I have to get done today before I leave and and make that list? Also on your calendar, you can push back or even skip the non VIP items, so don't feel bad if you had something weekly like checking in with staff or thanking your people, you had it on there. You're just underwater.

Cannot get to it. It's okay to skip that. Don't skip it forever. You can skip it this week. Now for certain deadlines and tasks that are VIP deadlines or tasks, I use an asterisk. So on the item, I start with an asterisk at the beginning, and that way I know that really can't be skipped or can't be moved back.

I also try to prioritize what is customer or resident facing. So if you're underwater, make sure that we are taking care of the issues that are customer facing for us. Just breathe. Right? Take a deep breath. Even right now, like in for four, 123, four hold and out for four. 1234. Okay. We get overwhelmed. We get super busy.

45:16 - 50:05

Cara Silletto

We get that by analysis. I don't even know what to work on. So just breathe first and then don't freeze. If you find yourself just paralyzed, pick something. I will close my eyes and point at my inbox, and I will just handle that email because I don't even know where to go. But it's better than doing nothing. So at least do something moving forward.

All right. And then think about this as well. So AI is available. And it would be silly of me to go through this whole podcast, particularly when I'm talking about efficiency and organization and to not talk about AI. Okay. So don't forget, you do have AI tools at your fingertips. Some of you are using this masterfully, and others are still just dip in your toe in the AI waters, which is fine, but some ideas for you.

It can a lot of times, depending on how you have your AI set up, it can create these meeting agendas that I suggested. It can build out checklists for, whether that's for onboarding or other processes using certain equipment. It can build out that SOP for you, that standard operating procedure. It can also quote you through this transformation. So you can tell your AI sidekick, hey, I need help.

I need a pep talk, I need reminders, I need the benefits of this. Why should I do this? You know, and it can kind of coach you and give you step by step what to do this week, next week and the following week. All right. So you can ask your AI to help you out with calendar management inbox management.

Whenever you're ready for the next step of organization, you can ask it for tips and tricks and and the first draft of that. Okay, now I will tell you, I slowly made myself foolproof over time and became more organized over time without AI. So you don't have to use that tool, but it can certainly expedite your success. All right.

It is just a tool. And if it intimidates you or is not helpful, that's fine. If you're getting better at AI, then start with some organization prompts of how can I get better organized? How can I manage my calendar more efficiently and more effectively? I have all these things to do. How can I possibly prioritize them? And it can really help you get there as well.

All right. So hopefully, you know, coming back to basics y'all. None of this is rocket science becoming back to basics of meeting agendas, calendar reminders, thinking in terms of what do I need to do daily, weekly, monthly, quarterly, annually and with a retention spin on it? I'd love for you to think about what do I need to do for my team as a leader, as their their communicator, you know, their guide in their role?

What do I need to be doing daily, weekly, monthly, quarterly and annually for my team and setting up those reminders because a lot of your job job is happening daily is from memory and is some firefighting on the floor, of course, but it's those team items. It's that leadership stuff that tends to go to the back burner because we are so busy.

So if you know you need to get those things to the front burner, I encourage you to really take this seriously and put some steps in place toward being more organized and more proactive. So if you'd like to stop saying sorry, I forgot writing in your emails, sorry for my delayed response. It may be time to tweak your approach and make some of these organizational tips a priority for this month or next month, or make it a quarterly focus area for yourself.

All right, now, I hope this discussion on foolproofing your workflows and creating a better rhythm for yourself has been helpful to recalibrate your workload and kind of reset where you are, particularly around retention and HR initiatives, but also with your daily leadership and communication approach as well. So on my future Bridge the Gap podcast episodes, I'm going

to dive into more ways to become a better leader and to create that better workplace for all, including yourself.

Okay, but if you want to learn more strategies now, you can always connect with me on LinkedIn and subscribe to our YouTube page at [youtube.com](https://www.youtube.com). My name is Cara and it has been a pleasure doing these podcasts for you this year. I want to thank you for listening to this week's Bridge the Gap Contributor Wednesday, and I'll see you next month. Have a great day.