



# CES Manager Strategy Job Aid

## Turning Data into Direction

### Table of Contents

Purpose of this Job Aid

How to Use this Job Aid

Additional Resource: Excel Skill Development

What Good Looks Like

Core Strategy Use Cases

Use Case 1: Prioritizing High Need Members Without Ignoring Others

Use Case 2: Creating Manageable, Targeted Work Lists

Use Case 3: Leveraging Shared Location or Geography

Use Case 4: Disposition-Driven Follow-Up Strategies

Use Case 5: Equitable Work Distribution Across the Team

Use Case 6: Playing to Team Strengths

Strategy Design Checklist

Sample Practice Exercises

Exercise 1: From Overload to Focus

Exercise 2: Disposition-Driven Decision Making

Exercise 3: Strategy + Team Strengths

Exercise 4: Critical Thinking Challenge

Mapping to Leadership Capability Outcomes

Bottom Line: A Note on Critical Thinking

## Purpose of This Job Aid

This job aid is designed to help CES managers use data to make better leadership decisions, not just to create reports. It answers three questions managers face daily:

1. What should my team focus on right now?
2. Why does this strategy make sense?
3. How do I turn a large, cumbersome dataset into clear, fair, actionable direction?

This is not about *perfect analysis*. It's about better judgment, faster prioritization, and clearer leadership direction.

## How to Use This Job Aid

This job aid is organized around a small set of recurring CES manager strategy decisions. Each use case includes:

- When you would use it
- Why it matters
- Key leadership questions to ask before acting
- Typical strategy moves
- Common judgment calls to make

Use this resource when you need to:

- Decide where your team should focus *right now*
- Translate a large dataset into clear direction
- Explain the “why” behind a strategy to your team
- Adjust strategy without waiting for perfect information

## Additional Resource: Excel Skill Development (Optional)

This job aid focuses on how managers think and decide, not on Excel mastery. The goal is to help you use data to make intentional leadership decisions, even with basic spreadsheet skills. That said, some managers may want to build deeper confidence and efficiency in Excel to support their work. For those who are interested in going further, [Excel Campus](#) is a recommended optional resource.

## What Good Looks Like

Effective CES managers:

- Use data to *focus* work, not overwhelm teams
- Can explain the *why* behind a strategy
- Adjust approach based on:
  - Patient need
  - Team strengths
  - Operational reality
- Avoid “one-size-fits-all” directives
- Revisit and refine strategy over time

## Core Strategy Use Cases

The following use cases represent the initial set of CES manager data strategies this job aid supports. They reflect the most frequent and highest-impact decisions managers are asked to make today.

**This is not an exhaustive list.** It is a starting framework that can grow over time as new strategies emerge.

### ***Use Case 1: Prioritizing High-Need Members Without Ignoring Others***

**Leadership question:** “Where should our attention go first, and what can wait?”

**What this enables:**

- Short-term focus (e.g., a two-week blitz)
- Better patient outcomes
- Clear expectations for the team

**Typical strategy moves:**

- Filter by *high* stratification
- Compare volume across high / medium / low
- Decide:
  - What gets focused attention now
  - What remains in baseline workflows

## Why this matters for managers:

When managers don't intentionally prioritize, teams are left to interpret urgency on their own. This often results in work being spread thinly across too many competing priorities, with the highest-need members not receiving focused attention.

Over time, this creates:

- Confusion about what "good focus" looks like
  - Frustration when effort doesn't translate into impact
  - Erosion of trust when priorities appear to change implicitly instead of explicitly
- Clear prioritization is a leadership responsibility—not a team guessing game.

## Key leadership judgment:

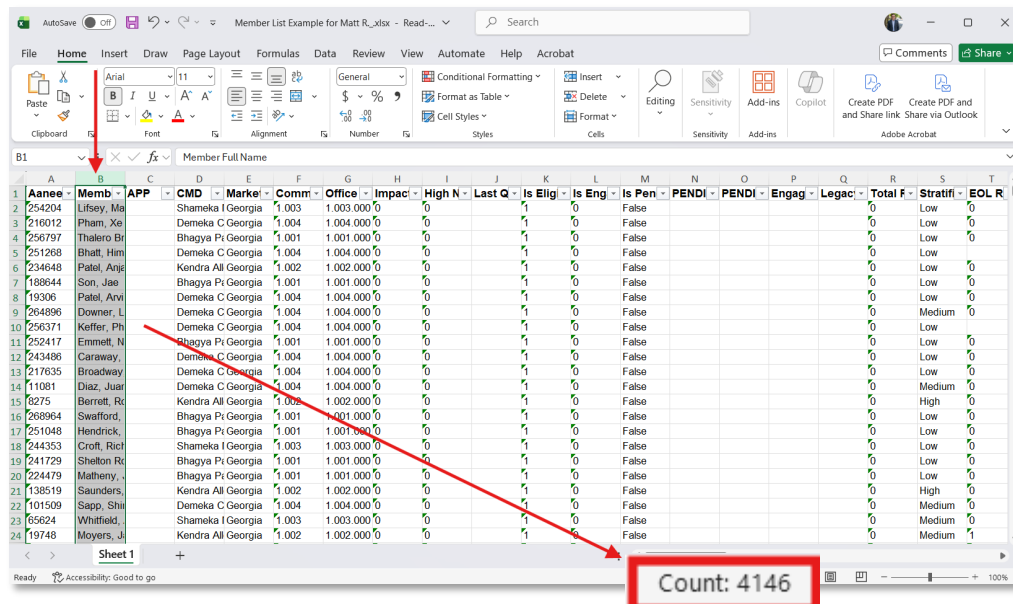
- Prioritizing ≠ abandoning
- Strategy is time-bound and revisited

## Step-by-Step: How Managers Manipulate the Data

### Step 1: Start with the full unengaged member list

- Open the full dataset without filtering anything yet.
- Confirm total volume so you understand scale before narrowing.

**Leadership decision:** What proportion of this list realistically deserves focused attention *right now*?

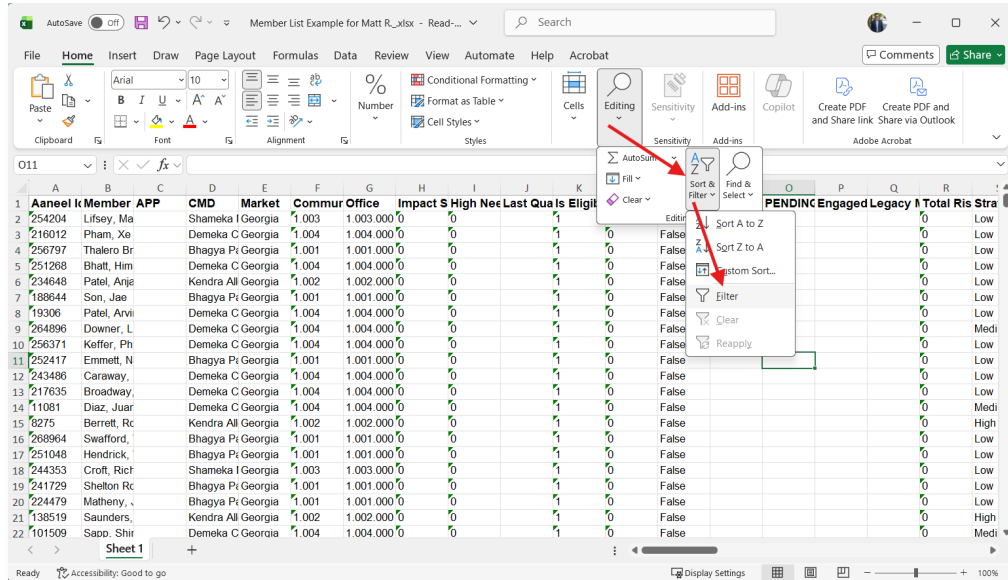


A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Member Full Name																		
1	Aanee	Memb	APP																
2	254204	Lifsey, Ma		Shameka I Georgia	1.003	1.003.000	0												
3	216012	Pham, Xe		Demeka C Georgia	1.004	1.004.000	0												
4	256797	Thalero Br		Bhagya Pt Georgia	1.001	1.001.000	0												
5	251268	Bhatt, Him		Demeka C Georgia	1.004	1.004.000	0												
6	234648	Patel, Anj		Kendra All Georgia	1.002	1.002.000	0												
7	186644	Son, Jae		Bhagya Pt Georgia	1.001	1.001.000	0												
8	19396	Patel, Anv		Demeka C Georgia	1.004	1.004.000	0												
9	264896	Dominer, L		Demeka C Georgia	1.004	1.004.000	0												
10	256371	Keffler, Ph		Demeka C Georgia	1.004	1.004.000	0												
11	252417	Emmett, N		Bhagya Pt Georgia	1.001	1.001.000	0												
12	243486	Caraway,		Demeka C Georgia	1.004	1.004.000	0												
13	217635	Broadway,		Demeka C Georgia	1.004	1.004.000	0												
14	11081	Diaz, Juan		Demeka C Georgia	1.004	1.004.000	0												
15	8275	Berrett, Rc		Kendra All Georgia	1.002	1.002.000	0												
16	268964	Swafford,		Bhagya Pt Georgia	1.001	1.001.000	0												
17	251048	Hendrick,		Bhagya Pt Georgia	1.001	1.001.000	0												
18	244353	Croft, Rich		Shameka I Georgia	1.003	1.003.000	0												
19	241729	Shelton Rc		Bhagya Pt Georgia	1.001	1.001.000	0												
20	224479	Matheny, J		Bhagya Pt Georgia	1.001	1.001.000	0												
21	138519	Saunders,		Kendra All Georgia	1.002	1.002.000	0												
22	101509	Sapp, Sha		Demeka C Georgia	1.004	1.004.000	0												
23	65624	Whitfield,		Shameka I Georgia	1.003	1.003.000	0												
24	19748	Moyers, JI		Kendra All Georgia	1.002	1.002.000	0												

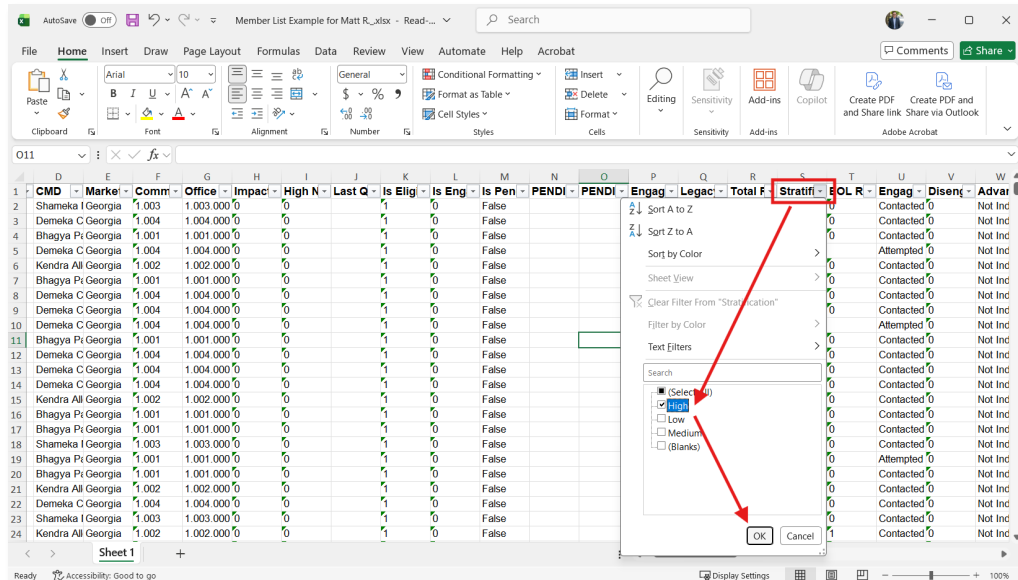
## Step 2: Apply a filter on Stratification

- Filter the Stratification column to show **High** only.
- Note how the volume changes.

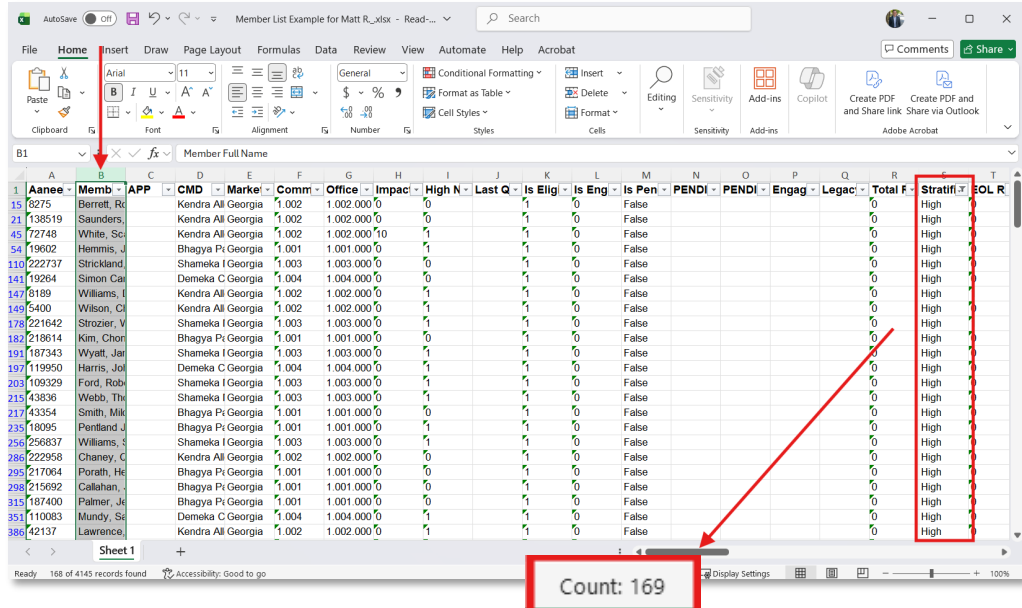
**Leadership decision:** Does this subset represent an appropriate short-term focus?  
*In the 'Home' menu, find 'Editing'. Select 'Sort & Filter'. Then select 'Filter'. Notice that a drop-down menu appears at the top of each column.*



Select the drop-down menu for Column S, Stratification. Uncheck '(Select All)' to clear all checked boxes, and then check 'High' only. Then, select 'OK'.



Notice the original count (4146) has now decreased to 169, displaying only those records with a 'High' stratification.

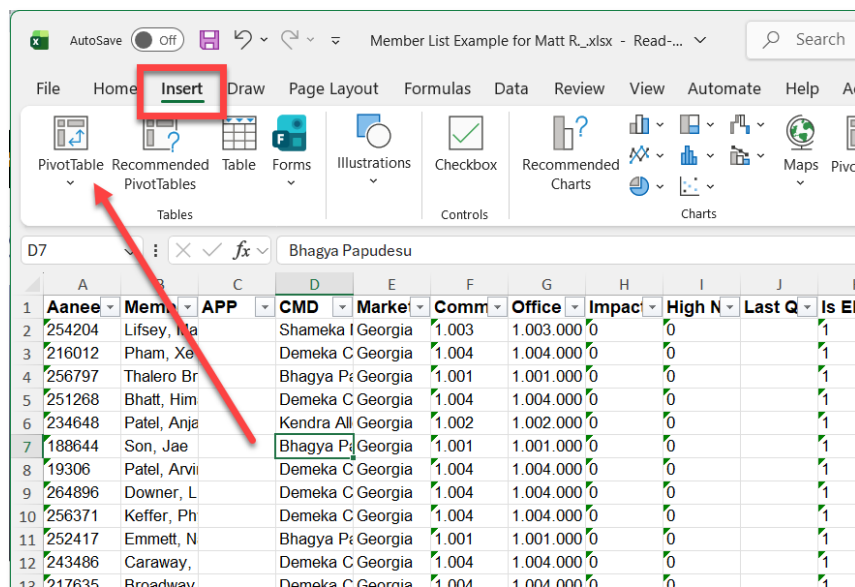


### Step 3: Compare High vs. Medium vs. Low

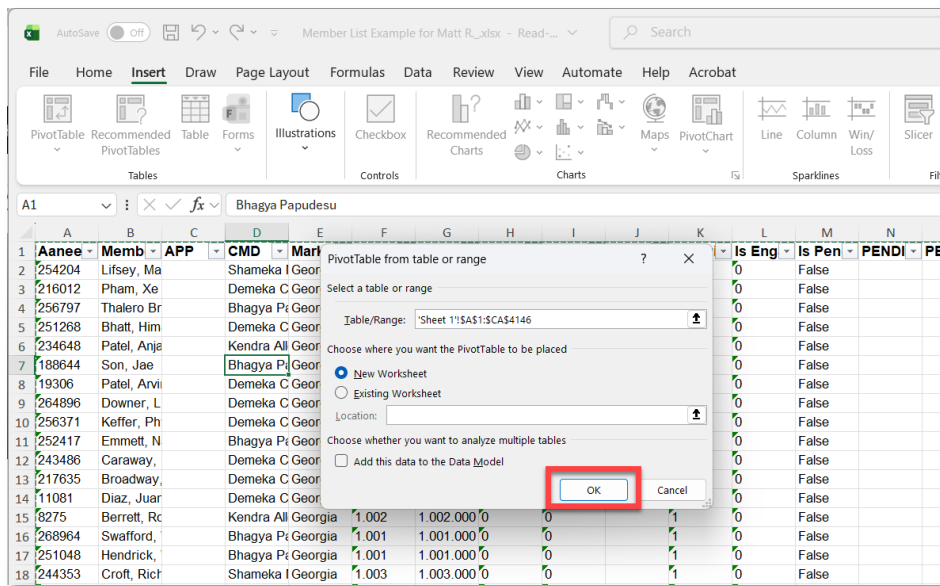
- Briefly toggle Medium and Low back on.
- Create a pivot table for comparison.

**Leadership decision:** What am I intentionally *not* focusing on during this period—and why?

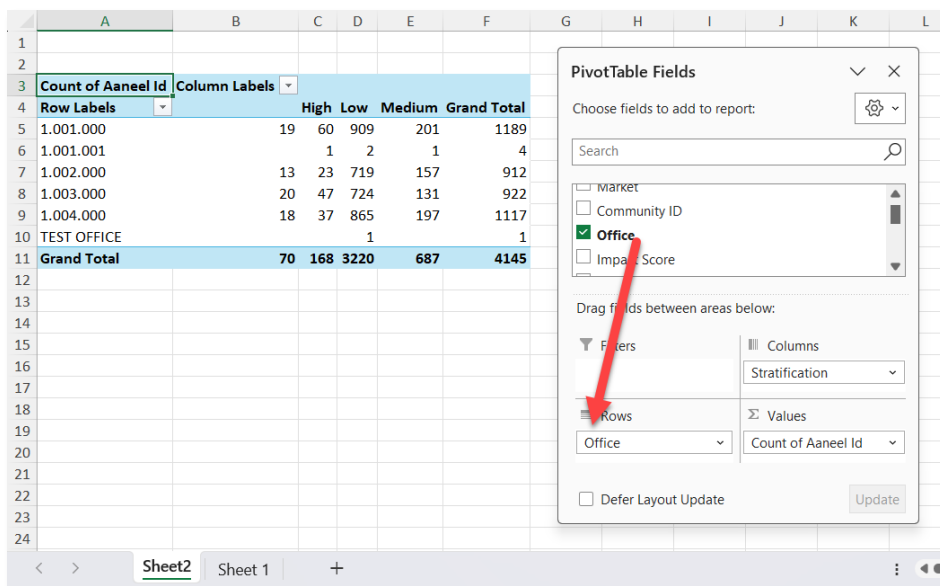
Start by selecting any cell in the data range, and then go to the 'Insert' tab. Select the 'Pivot Table' button.



Leave the default Pivot Table settings in place, and select 'OK'.



Drag 'Office' to Rows. Drag 'Stratification' to Columns. Drag 'Aaneel Id' to Values. That's it! With just a few mouse clicks, you've **created the entire report**.



#### Step 4: Use your new Pivot Table to compare High vs. Medium vs. Low by office.

- Separate your data to isolate like data into additional sheets.
- Decide whether a single, uniform strategy makes sense or whether offices require differentiated approaches based on their mix of High, Medium, and Low members.

**Leadership decision:** Where should we focus *differently* across offices, and where should we focus *consistently*?

Double-click any value in the Pivot Table to isolate that data set in a separate sheet.

Count of Aaneel Id	Column Labels	High	Low	Medium	Grand Total	
1.001.000		19	60	909	201	1189
1.001.001			1	2	1	4
1.002.000		13	23	719	157	912
1.003.000		20	47	724	131	922
1.004.000		18	37	85	197	1117
TEST OFFICE				1		1
<b>Grand Total</b>		<b>70</b>	<b>168</b>	<b>3220</b>	<b>687</b>	<b>4145</b>

**PivotTable Fields**

Choose fields to add to report:

Search

Market  
 Community ID  
 Office  
 Impact Score

Drag fields between areas below:

Filters:   
 Columns: Stratification  
 Rows: Office  
 Values: Count of Aaneel Id

Defer Layout Update Update

Details for Count of Aaneel Id - Office: 1.002.000, Stratification: High							
Aaneel Id	Member Full Name	APP	CMD	Market	Community ID	Office	Impa
41210	Faulk, Edward		Kendra Allen	Georgia	1.002	1.002.000	0
103758	Rollins, James		Kendra Allen	Georgia	1.002	1.002.000	0
283251	Adams, Julian		Kendra Allen	Georgia	1.002	1.002.000	0
289246	Moore, Roosevelt		Kendra Allen	Georgia	1.002	1.002.000	0
74314	Bowers, Sabra		Kendra Allen	Georgia	1.002	1.002.000	0
117867	Laing, Charles		Kendra Allen	Georgia	1.002	1.002.000	0
200456	Pelletier, Norma		Kendra Allen	Georgia	1.002	1.002.000	0
240653	Nguyen, Thoi		Kendra Allen	Georgia	1.002	1.002.000	0
254940	Sanders, Randy		Kendra Allen	Georgia	1.002	1.002.000	0
208205	Anderson, Henry		Kendra Allen	Georgia	1.002	1.002.000	0
239278	Acker, Brandon		Kendra Allen	Georgia	1.002	1.002.000	0
254870	Williams, James		Kendra Allen	Georgia	1.002	1.002.000	0
43021	Rhodes, John		Kendra Allen	Georgia	1.002	1.002.000	0
8275	Berrett, Robert		Kendra Allen	Georgia	1.002	1.002.000	0
220527	Johnson, Shamekia		Kendra Allen	Georgia	1.002	1.002.000	0
240345	Edmiston, Louarleen		Kendra Allen	Georgia	1.002	1.002.000	0
6654	Grant, Clarence		Kendra Allen	Georgia	1.002	1.002.000	0
42137	Lawrence, Patricia		Kendra Allen	Georgia	1.002	1.002.000	0
222958	Chaney, Quincy		Kendra Allen	Georgia	1.002	1.002.000	0
138519	Saunders, Montrez		Kendra Allen	Georgia	1.002	1.002.000	0
5400	Wilson, Charles		Kendra Allen	Georgia	1.002	1.002.000	0

## Use Case 2: Creating Manageable, Targeted Work Lists

**Leadership question:** “How do I take 5,000+ unengaged members and make this doable?”

**What this enables:**

- Reduced cognitive overload
- Higher follow-through
- Better execution quality

**Typical strategy moves:**

- Hide irrelevant columns.
- Filter by:

- Stratification
- Geography
- PCP
- Disposition
- Produce **smaller, intentional lists** tied to a clear purpose

### Why this matters for managers:

Without intentional list-building, teams are often handed overwhelming volumes of work with little context. Large, unfiltered lists create analysis paralysis, uneven execution, and inconsistent results.

The leadership risk is subtle but serious:

- Teams equate volume with success rather than outcomes
- High performers burn out trying to “do it all”
- Managers lose credibility when expectations feel unrealistic

Focused lists signal thoughtful leadership, not reduced ambition.

### Key leadership judgment:

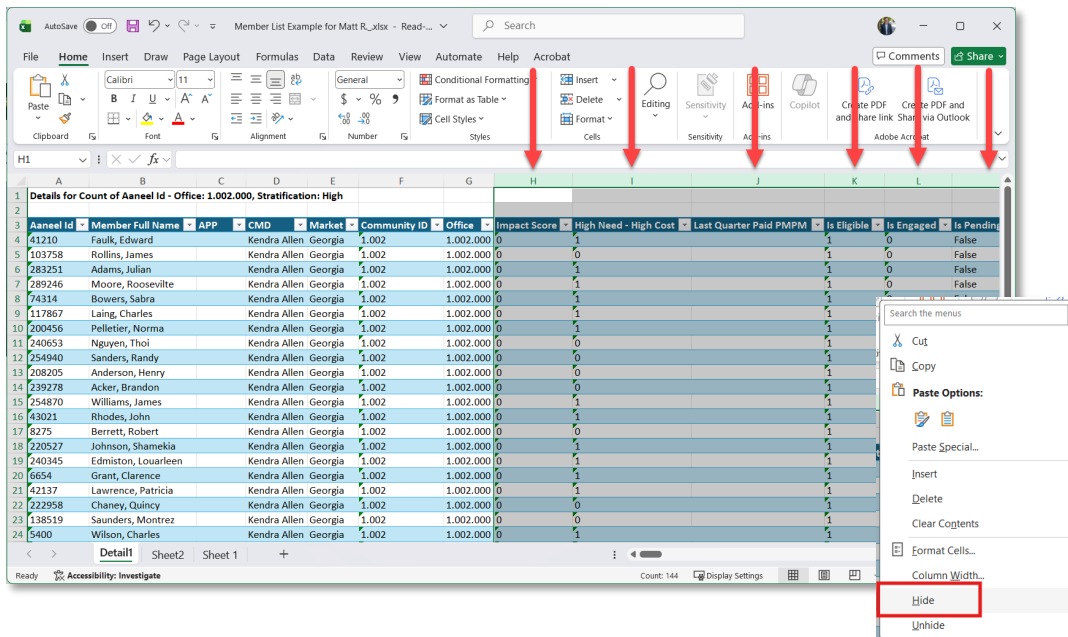
- Smaller lists with clarity outperform large lists with ambiguity.

## Step-by-Step: Creating Manageable, Targeted Work Lists

### Step 1: Begin with your priority subset

- Use the output from Use Case 1 (or similar).
- Confirm starting volume.

*First, hide irrelevant columns for a cleaner visual approach. Shift + click on the column's letter to select multiple columns at once. Then, right-click on the highlighted columns, and select 'Hide'.*



Notice that selected columns (H through R) are now hidden, and only relevant data is visible.

Aaneel Id	Member Full Name	APP	CMD	Market	Community ID	Office	Stratification	EOL Risk Classification	Engagement Status
41210	Faulk, Edward		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
103758	Rollins, James		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
283251	Adams, Julian		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
289246	Moore, Roosevelt		Kendra Allen	Georgia	1.002	1.002.000	High	0	Attempted
74314	Bowers, Sabra		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
117867	Laing, Charles		Kendra Allen	Georgia	1.002	1.002.000	High	1	Contacted
200456	Pelletier, Norma		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
240653	Nguyen, Thoi		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
254940	Sanders, Randy		Kendra Allen	Georgia	1.002	1.002.000	High	0	Attempted
208205	Anderson, Henry		Kendra Allen	Georgia	1.002	1.002.000	High	1	Contacted
239278	Acker, Brandon		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted
254870	Williams, James		Kendra Allen	Georgia	1.002	1.002.000	High	0	Contacted

## Step 2: Apply a second filter to narrow further

Examples:

- Geography
- PCP
- Engagement
- Disposition
- Acute Admits Last Twelve Months

**Leadership decision:** Which additional lens best supports execution *right now*?

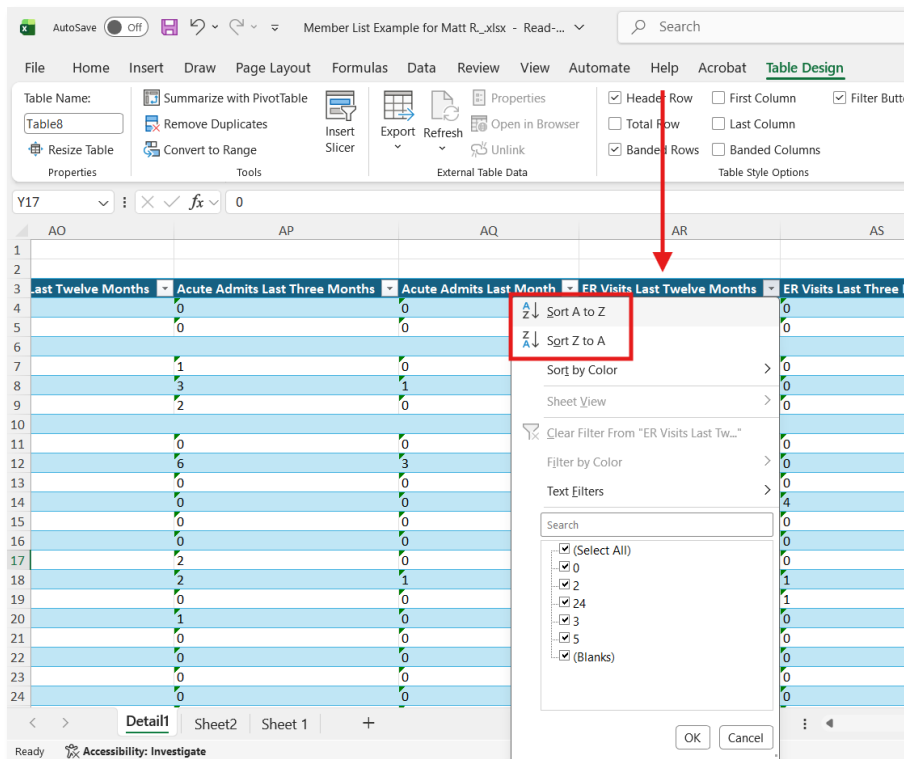
*As you add additional filters, the list will narrow to the specific criteria selected.*

### Step 3: Sort by the factor that drives urgency or efficiency

- Sort by:
  - Last outreach date
  - ER Visits Last Twelve Months
  - Disposition

**Leadership decision:** What ordering helps the team act with clarity?

*Use the dropdown filter to sort by 'ER Visits Last Twelve Months', either highest to lowest or lowest to highest.*



### Step 4: Create a new worksheet or saved view

- Copy filtered results into a clearly named tab (e.g., “High Need – Week 1”).

### Use Case 3: Leveraging Shared Location or Geography

**Leadership question:** “Where can we work smarter—not harder?”

**What this enables:**

- More efficient outreach
- Facility-based or community-based engagement
- Better use of field time

**Typical strategy moves:**

- Identify multiple members at one address or location
- Decide:

- Is this residential, assisted living, or facility-based?
- Does this warrant coordinated outreach?

### **Why this matters for managers:**

When geographic patterns are ignored, teams default to inefficient outreach—traveling more, connecting less, and missing opportunities for coordinated engagement.

If this decision isn't made intentionally:

- Time and energy are wasted on avoidable fragmentation
- Field teams grow frustrated by preventable inefficiencies
- Leaders appear disconnected from day-to-day operational realities

Strategic use of geography demonstrates respect for both staff effort and patient context.

### **Key leadership judgment:**

- Strategy balances efficiency *and* patient appropriateness

## **Step-by-Step: Disposition-Driven Follow-Up Strategies**

### **Step 1: Filter the list to include address or location fields**

- Ensure Address (or Location ID) is visible.
- Remove unnecessary columns to reduce noise.

### **Step 2: Sort or group by address**

- Sort addresses alphabetically.
- Look for repeats or clusters.

**Leadership decision:** Which clusters represent meaningful engagement opportunities vs. coincidence?

### **Step 3: Flag multi-member locations**

- Add a temporary helper column:
  - "Shared Address = Yes/No"

### **Step 4: Decide outreach approach**

- Single visits vs. coordinated efforts vs. further research

**Leadership decision:** Is efficiency appropriate here—or does context require caution?

## Use Case 4: Disposition-Driven Follow-Up Strategies

**Leadership question:** “What should we stop repeating—and what needs a different approach?”

**What this enables:**

- Avoiding wasted effort
- Smarter outreach tactics
- Better conversion over time

**Examples:**

- Invalid phone numbers → research task
- No answer / left message → timing adjustment
- Repeated failed attempts → alternative approach

**Why this matters for managers:**

Treating all outreach attempts the same leads teams to repeat actions that have already proven ineffective. Without strategy shifts, effort increases while results stagnate.

The leadership risk includes:

- Learned helplessness (“We keep trying, but nothing changes”)
- Quiet disengagement when teams feel their work doesn’t matter
- Misinterpreting strategy failures as performance problems

Intentional disposition-based strategies protect morale and reinforce smart persistence.

**Key leadership judgment:**

- Same action repeatedly = poor strategy, not effort problem

## Step-by-Step: Disposition-Driven Follow-Up Strategies

**Step 1: Filter by Disposition**

- Isolate one disposition at a time (e.g., Invalid Number).

**Step 2: Count volume per disposition**

- Use a simple pivot table:
  - Rows: Disposition
  - Values: Member count

**Leadership decision:** Which dispositions deserve a *different* strategy—not more of the same?

**Screenshot:**

- Basic pivot table showing counts

### **Step 3: Create disposition-specific lists**

- Copy filtered dispositions into separate worksheets.

#### **Screenshot:**

- Tabs labeled by disposition strategy

### **Step 4: Match strategy to disposition**

- Outreach
- Research task
- Re-timing
- Alternate method

## ***Use Case 5: Equitable Work Distribution Across the Team***

**Leadership question:** “How do I assign work fairly and realistically?”

#### **What this enables:**

- Reduced burnout
- Clear expectations
- Trust in leadership decisions

#### **Typical strategy moves:**

- Break lists into comparable volumes
- Account for:
  - Current workload
  - Role complexity
  - Team capacity

#### **Why this matters for managers:**

When workload distribution isn’t intentional, inequity—real or perceived—quickly emerges. Some team members feel overloaded, while others disengage due to underutilization or unclear expectations.

This creates:

- Burnout in high performers
- Resentment and fairness concerns
- Loss of trust in leadership judgment

Equity isn't about identical assignments. It's about explainable, defensible decisions.

**Key leadership judgment:**

- Fair ≠ identical
- Transparent rationale matters

## Step-by-Step: Equitable Work Distribution Across the Team

**Step 1: Start with your focused list**

- Confirm total volume to be divided.

**Step 2: Determine team capacity**

- List CES names and approximate workload assumptions (even rough).

**Step 3: Divide the work intentionally**

- Sort data randomly or by neutral factor.
- Assign blocks of rows equitably.
- Create one tab per CES.

**Leadership decision:** What does “fair” look like in *this* context?

## Use Case 6: Playing to Team Strengths

**Leadership question:** “Who is best suited for *which* work—and why?”

**What this enables:**

- Higher engagement
- Better outcomes
- Talent development

**Examples:**

- Strong in-person skills → facility outreach
- Strong call performance → phone-heavy strategies
- Relationship builders → provider or hospital engagement

**Key leadership judgment:**

- Strategy adapts to people—not just data

**Why this matters for managers**

A one-size-fits-all strategy ignores the reality that people perform best when their strengths are intentionally leveraged. When assignments don't align to capability, productivity and engagement both suffer.

Without this decision:

- Strong skills are underused
- Individuals disengage when repeatedly set up to struggle
- Coaching becomes corrective instead of developmental

Strength-based strategy signals that leaders see their people—not just the data.

## Step-by-Step

### Step 1: Identify strengths before touching the data

- Note team strengths (field-based, phone-based, relationship-focused).

### Step 2: Filter data to match strengths

Examples:

- Geography → field staff
- Phone-viable dispositions → callers

### Step 3: Assign work accordingly

- Create targeted lists that align to capability.

**Leadership decision:** How do I explain this as thoughtful—not preferential?

## Strategy Design Checklist

Before cascading a plan to your team, ask:

- What problem are we solving *right now*?
- Why this strategy?
- Why now?
- Who is this best suited for?
- What will success look like in 2 weeks?
- When will we stop, reassess, or pivot?

## Sample Practice Exercises

The exercises in this section are designed to strengthen critical thinking as a core leadership skill. They are intentionally practice-based and scenario-driven—not to test technical proficiency, but to help managers build judgment, clarity, and confidence when working with imperfect information.

These exercises focus on how leaders think, not just what they do. As you work through them, you should expect to slow down, weigh tradeoffs, and make decisions you can clearly explain to others.

As you move through each exercise, use the questions below to guide your thinking:

- What problem am I solving right now?
- What tradeoffs am I accepting by choosing this approach?
- Who is this strategy best suited for—and who might it unintentionally disadvantage?
- What signals would tell me this strategy isn't working?
- When and how should I reassess or adjust my approach?

There may not be a single “right” answer. The goal is to practice making intentional, defensible leadership decisions and to build comfort acting with clarity even when certainty is limited.

### *Exercise 1: From Overload to Focus*

**Scenario:** You receive a list of 6,000 unengaged members across a market with 8 CES.

**Task:**

- Identify **one focused strategy** for the next two weeks
- Produce a manageable list aligned to that strategy
- Decide what happens to the rest of the work

**Prompting questions:**

- What filter matters most here?
- Why this approach?
- How will the team understand the “why”?

**Evaluation Criteria:**

- Strategy is clear and intentional
- Rationale is explainable in plain language

- Workload is realistic
- Decision reflects prioritization—not avoidance

## ***Exercise 2: Disposition-Driven Decision Making***

**Scenario:** Large volume of members have invalid or incorrect contact information.

**Task:**

- Design a targeted approach for this population
- Assign work across the team

**Prompting questions:**

- What’s different about this work?
- Who should do it?
- What success looks like beyond “activity”?

**Evaluation Criteria:**

- Strategy matches the problem type
- Clear handoff to the team
- Avoids repeating unproductive actions

## ***Exercise 3: Strategy + Team Strengths***

**Scenario:** Your team includes:

- One strong field-based CES
- One high-volume caller
- One strong relationship-builder

**Task:**

- Use one dataset to create **different assignments** for each

**Prompting questions:**

- How does this assignment help each person succeed?
- How would you explain this to the team?

**Evaluation Criteria:**

- Intentional differentiation
- Clear fairness logic
- Strategy uses people wisely

## ***Exercise 4: Critical-Thinking Challenge***

**Scenario:** Leadership asks for improvement in engagement—no further guidance.

**Task:**

- Choose a strategy
- Justify it using data
- Outline risks and tradeoffs

**Evaluation Criteria:**

- Thoughtful decision-making
- Awareness of tradeoffs
- Ability to defend the approach

## Mapping to Leadership Capability Outcomes

LEADERSHIP CAPABILITY	HOW THIS JOB AID BUILDS IT
STRATEGIC THINKING	Forces intentional prioritization and tradeoff awareness
DECISION-MAKING	Moves managers from reaction → judgment
COMMUNICATION CLARITY	Requires leaders to articulate the “why”
ACCOUNTABILITY	Aligns expectations with clear direction
COACHING & DEVELOPMENT	Encourages playing to strengths
LEADING THROUGH AMBIGUITY	Teaches action without perfect information
OPERATIONAL JUDGMENT	Balances efficiency, equity, and impact

### Bottom Line: A Note on Critical Thinking

This job aid is intentionally not prescriptive. CES managers will often face situations where:

- Data is incomplete
- Priorities conflict
- Direction is evolving

The goal is not to “follow steps,” but to **practice sound judgment, explain decisions clearly, and adjust course thoughtfully**. Discomfort is expected. That discomfort is part of building leadership capacity.