

2025

# Healthcare Operating Model Trends

ALIGNING TALENT, TECHNOLOGY, AND DATA FOR A RESILIENT FUTURE

**Caring for patients is one of the greatest callings.**

However, care delivery faces fundamental challenges—leaders are under significant pressure to increase access and affordability, better coordinate care, and retain high-performing staff.

This report explores how health system leaders are rethinking their operating models to meet rising demands for access, affordability, and care coordination. Drawing insights from more than 145 executives, the findings reveal a shared urgency to modernize legacy systems, streamline operations, and better align strategy with execution. The report highlights the role of integrated planning, data-driven decision-making, and intelligent automation in building resilient, patient-centered organizations—and offers actionable recommendations for leaders navigating today's complex healthcare landscape.

## About our survey

Health system executives are increasingly concerned about whether their current operating models—structures, processes, people, and infrastructure—are fit for future challenges, according to a Guidehouse analysis of a survey conducted by the Healthcare Financial Management Association (HFMA).

Across the healthcare landscape, a new class of leaders is emerging—those who are not only responsible for overseeing care delivery but are also actively shaping the systems that support it. These “patient care leader-doers”<sup>1</sup>—including physicians, nurses, and operational managers—are uniquely positioned to drive meaningful change. Their proximity to both patients and processes gives them a clear view of what’s working, what’s not, and where transformation is most urgently needed.

The survey, which included responses from over 145 executives in late 2024, revealed that most leaders foresee significant challenges to their existing operating models. Some of those challenges arise from marketplace trends such as declining reimbursement,

labor competition, and potential reductions in subsidized uncompensated care. Others are internal, such as data and metrics overload from multiple departments and sources, misaligned goals and incentives, resource and capital waste, and persistent labor turnover. Despite these challenges, leaders are not standing still—many are reimagining their operating models by refining service lines, strengthening corporate functions, and exploring strategic partnerships and M&A activity to scale impact.

What unites these leaders is a shared recognition that goals and metrics alone are not enough. While most organizations track similar performance indicators, the real differentiator lies in how those metrics are used. Leaders acknowledge that their operating rhythms, structures, and tools need better alignment, transparency, and rigor to respond to the data and meet their communities’ needs. This report recommends steps for accomplishing this alignment and offers insights into how health systems are re-envisioning their operating models to achieve strategic goals.



<sup>1</sup> “Patient care leader-doer” roles include managers, directors, and vice presidents who support direct patient care delivery in all care settings (e.g., acute, ambulatory, post-acute, etc.); this group includes physicians, nurses, other care delivery staff, and shared services support functions such as supply chain and IT.

# The state of the operating model

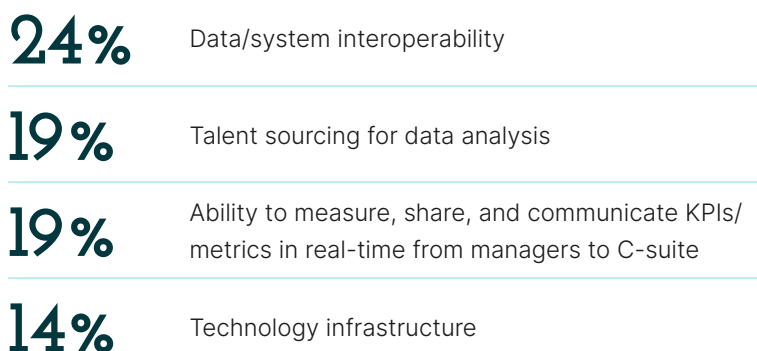
Healthcare operations are influenced by various internal and external factors. External factors include market shifts, technology changes, regulatory decisions, and economic conditions. Internally, operations leaders must respond to the needs, motivations, and operating rhythms of a variety of stakeholders: the board of directors, the executive team, middle management, frontline staff, and physicians. An organization's operating model must align these market conditions and operational characteristics to achieve a lasting impact.

## Pain points

### Better tech and talent needed

Modern healthcare organizations face the mixed blessing of data overload. Today's health systems employ a wide variety of technologies to document patient encounters, deliver care, and get reimbursed for services, generating a significant amount of data. While this data holds promise for improving operations, nearly half of respondents said they need better technology and data capabilities to connect their digital tools. When asked about their greatest challenges in deriving insights from data, nearly a quarter of respondents pointed to a lack of data or system interoperability, while others highlighted the need for additional analytics talent, technology, and real-time capabilities.

### Single greatest challenge in harvesting valuable insights from data



### ✓ KEY TAKEAWAYS

A health system's performance is based on thousands of decisions made by hundreds of dedicated people every day. Unfortunately, legacy technology often merely records these decisions rather than informing them.

Innovative health systems are leveraging talent and technology to enhance interoperability, integrating existing tools such as electronic health record (EHR) systems, enterprise resource planning (ERP), and time and attendance software. Data integration tools such as data bricks and real-time dashboards enable organizations to identify problems early, and decision-support software and predictive analytics can help healthcare leaders make swift, informed decisions to address these issues. Leaders should also consider upskilling talented staff with refreshed role definitions, best practice playbooks, and clearer key performance indicators (KPIs).

**Guidehouse helped a leading regional health system modernize its EHR, ERP, and IT infrastructure, enabling the organization to better manage cost pressures, improve productivity, and improve compliance.**

[Learn more.](#)



## Challenges in achieving enterprisewide alignment

Without the necessary technology or talent to analyze data, organizations are struggling to reach their full potential in achieving optimal financial and operational health. Few survey respondents felt they have the tools and information needed to align stakeholders and organize a cohesive enterprise-level approach to operations.

Health system leaders frequently report that they feel like they spend the majority of their days managing the crises that often take place between patients, facilities, and vendors when external market or regulatory factors change. Many of these crises are rooted in differences in communication style, processes, culture, structure, and expectations across these stakeholders, and ultimately lead to an inability to drive widespread organizational change. Without a more disciplined and resilient operating model, these problems persist.



**Only 1 in 3** have a clear, enterprisewide approach and rigorous operating rhythms that align strategic plans to annual goals and outcomes.



**Only 1 in 3** are creating connections between their annual budget, capital and people strategies, and long-term financial plan.



**Only 1 in 5** have a consistent approach to routine operating review processes, standard KPIs and dashboards, and accountability.

## ✓ KEY TAKEAWAYS

Setting goals is not enough—leaders must design their operating model to help them achieve their strategic vision. Health systems can provide better, more affordable, and coordinated care when they embrace an integrated operating model that includes comprehensive planning, informed operating decisions, and consistent operating rhythms at all levels. These best practices can help your organization follow your lead:

**Department-level accountability:** Empower service line managers to transition from explaining variances to solving problems by providing them with the necessary tools and processes for success. An accountability structure should be in place at each level of an organization, from the board of directors to the front line.

**Information sharing:** Regularly measure and share KPIs and metrics with patient care leaders at all levels, shifting from explaining budget misses to creating feasible solutions.

**Evidence-based decision making:** Base decisions on data, health services research, and industry-proven best practices. Guide managers on how to identify and solve specific problems to maximize impact across the organization.

**Regularly scheduled huddles at all levels:** To support a healthy operating rhythm and clear communication, huddles—monthly, weekly, or daily—should be a regular feature of the workplace.

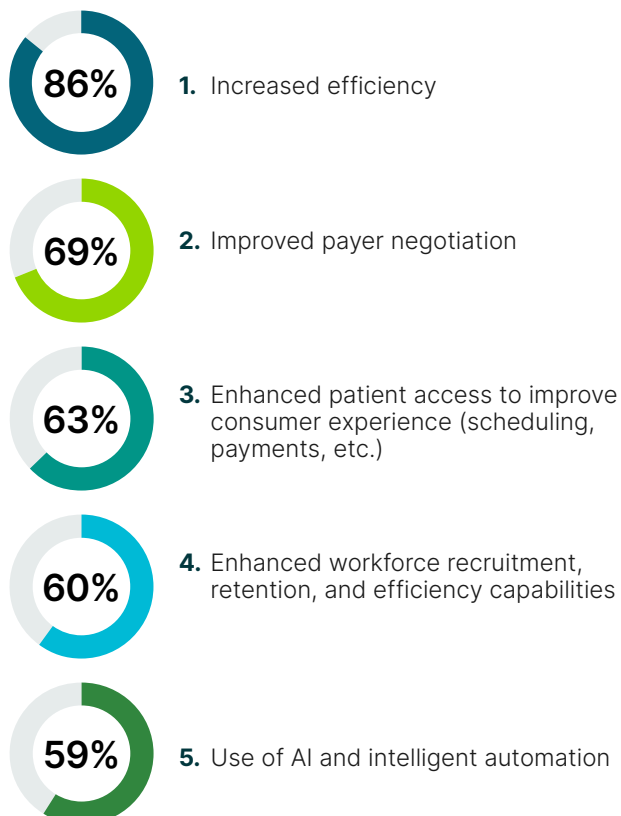


# Opportunities for growth

## Reducing waste

Healthcare has long struggled with chronic inefficiency. Survey results indicate that leaders recognize this and are aligned with a new presidential administration focused on using technology to streamline processes and eliminate waste in the healthcare system. Respondents overwhelmingly stated their intention to improve efficiency within their supply chain, revenue cycle, and other corporate services to reduce overhead and streamline care. They suggested that improvements to patient-access operations, such as scheduling and payment, can drive operational enhancements across their enterprises. They plan to use AI and automation to power operational improvements both on the frontlines and in the back office. Consequently, determining what to streamline, standardize, centralize, customize, and automate is a key capability that health systems are building.

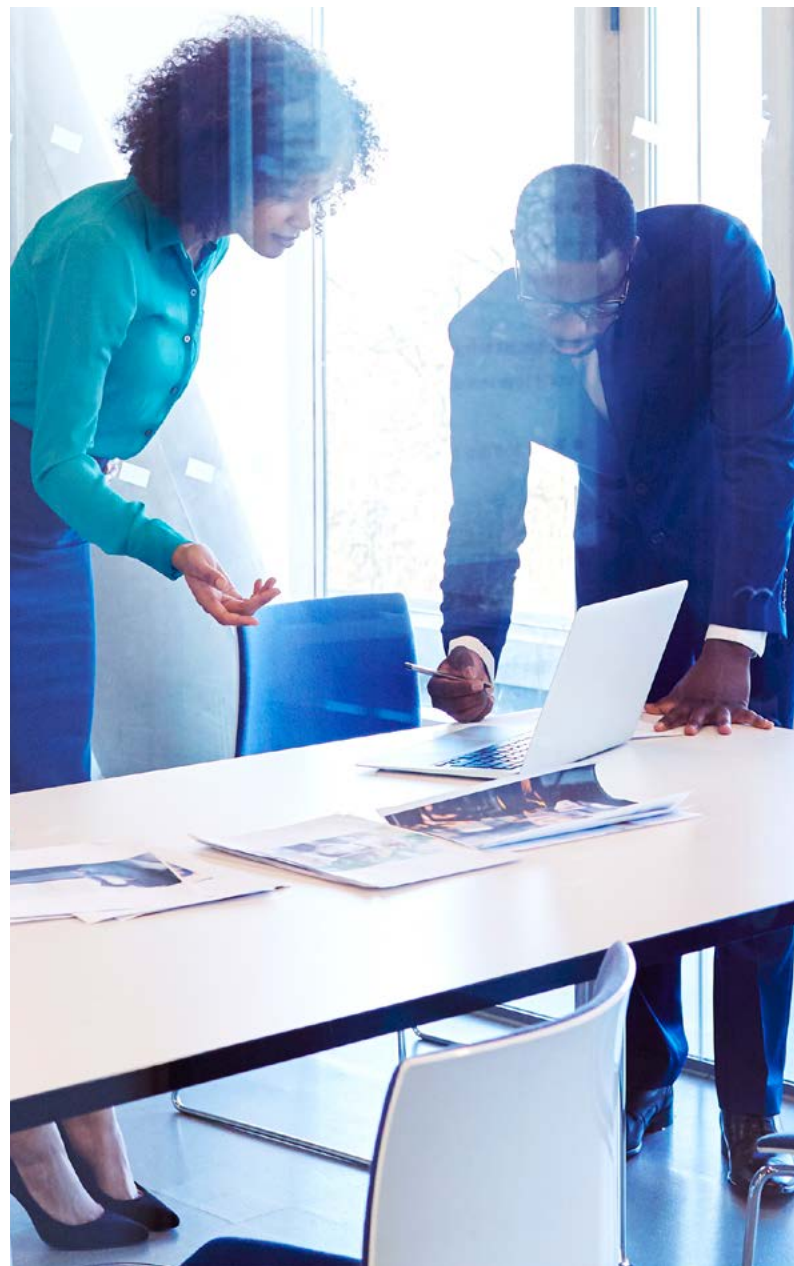
### Top 5 Areas for Intermediate and Long-Term Operational Improvement



## ✓ KEY TAKEAWAYS

Healthcare is burdened by time-consuming data entry and manual, repetitive processes essential to the reimbursement process that delay care and strain staff. Innovative organizations are investing in technology that allows patients to manage intake, scheduling, payments, and other tasks, thereby relieving staff burden. AI and automation can also reduce staff involvement in repetitive, rules-based tasks, allowing them to focus on more complex work. The prior authorization process is a key area where better payer-provider relationships and automated workflows can eliminate bottlenecks.

**Guidehouse helped a notable health system rework more than \$44 million in denied accounts by optimizing core technology and launching conversational AI with robotic process automation and operating model enhancements.**  
[Learn more.](#)

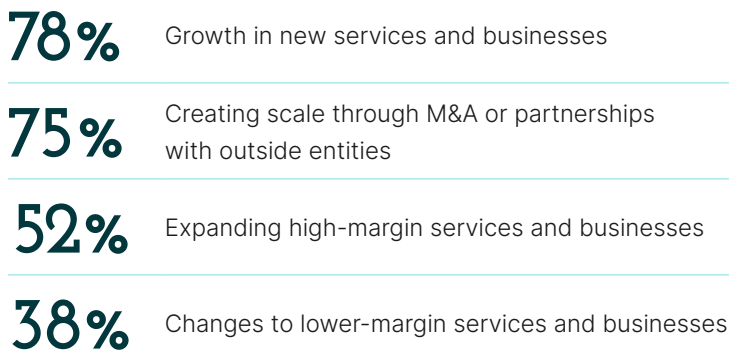




## New service lines and external collaborations

Many health systems are looking to develop new service lines and revenue sources to sustain their operations, with 78% of executives expecting growth through these initiatives. However, nearly as many respondents believe they cannot achieve this growth independently—three out of four executives anticipate engaging in M&A or partnerships to create scale.

### How Healthcare Executives Expect to Grow



## ✓ KEY TAKEAWAYS

Adding new services or businesses can pose significant risks for provider organizations, many of which are already challenged by declining reimbursement. When evaluating new service lines, organizations should adopt a disease-specific approach, exploring services that will grow in tandem with existing offerings, differentiate the organization from competitors, and offer favorable margins.

Survey respondents indicated that M&A and partnerships will remain a strategic imperative. As the industry faces pressure to focus on whole-person care and chronic conditions, health systems should seek partners that can help fill service gaps and enable a comprehensive approach to care. Organizations that provide a wider variety of services will be better positioned to acquire patients, retain business, and avoid network leakage.

**Guidehouse helped Tampa General Hospital increase available appointments online by 75%, increase online-scheduled appointments by 47%, and decrease no-shows by 20%. [Learn more.](#)**



## Conclusion

Today's healthcare organizations are being tasked with solving an ever-greater range of needs within their communities. Leaders who are up to the challenge must align their teams and partner with frontline staff to:

- **Define** an integrated strategic, operating, and financial plan.
- **Develop** integrated ways of working and upskilling, including service line and corporate services training and performance improvement functions.
- **Identify** functions that should be standardized across the enterprise, customized to facilities or departments, or centralized at the enterprise level —and determine where automation can assist.
- **Refresh** KPI dashboards and facilitate daily, weekly, and monthly operating reviews.
- **Manage** service-level agreements between corporate and field operations (e.g., between a hospital or clinic and a corporate function such as human resources or information technology).
- **Train** managers and above on the why, who, what, and how behind the operating model and its value to patients, staff, and the community at large.

When properly designed and aligned with an organization's mission and markets, an effective, integrated operating model becomes a guiding beacon for entire teams and a source of sustainable competitive advantage.

## About Guidehouse

Guidehouse is a global AI-led professional services firm delivering advisory, technology, and managed services to the commercial and government sectors. With an integrated business technology approach, Guidehouse drives efficiency and resilience in the healthcare, financial services, energy, infrastructure, and national security markets. Built to help clients across industries outwit complexity, the firm brings together approximately 18,000 professionals to achieve lasting impact and shape a meaningful future.

Learn more at [guidehouse.com](https://www.guidehouse.com)