

Full Course Transcript

Course Introduction

Hello! Welcome to the TenEleven learning course – Reports Don't Improve Outcomes. My name is Tristan Keelan and I am the Marketing Strategist here at the TenEleven Group, and I'm going to be your guide for this course.

For the recent past in the Behavioral Health Industry, you've heard a lot being said about Pay-for-Performance. Pay-for-Value. Value based payment models. Managed Care. Managed Medicaid. All of the terms that suggest the payment landscape is changing. Payers are ready to increase payment rates for agencies and providers who can demonstrate that they actually improve the quality of life for their clients. Value based payments have certainly arrived.

While the concept of value based payments is rather intuitive, we all know that the implications of this are substantial, and the impact couldn't be better illustrated than it is in what data we collect and what we do with it when we have it. The entire behavioral health industry has been shouting about the importance of technology reporting platforms to satisfy this new outcomes based payment model, but suggesting that reporting platforms are the answer is missing the point.

In order to illustrate how to use your reporting capabilities not only to demonstrate your good work, but to also improve the quality of your work, in this course we are going to discuss the process by which you can use your data to improve your outcomes.

First, we will discuss the importance of Strategic Planning. Strategic Planning will help align all of the data you capture, the reports you run, and the actions you take back into your overall agency goals and objectives.

Second, we will dissect the Data-to-Wisdom Continuum. The Data-to-Wisdom Continuum is the process by which we turn data elements into actionable items with predictable results.

And last, we will review an applied example of the Data-to-Wisdom Continuum in a behavioral health agency with the strategic objective of seeing patients more frequently by reducing the instances of no-shows by their clients.

The goal for this course is to remind you that Reports Don't Improve Outcomes. The best services do. And by the end of this course, you will understand exactly why Reports Don't Improve Outcomes, and you will know exactly what does.

Section #1: The Importance of Strategic Planning

Welcome to Section #1 of the TenEleven Learning Course, Reports Don't Improve Outcomes. This section is all about strategic planning. Before we can talk about using data, reports, and, ultimately, the Data-to-Wisdom Continuum to improve outcomes, we need to explore strategic planning.

Strategic planning is the vehicle that your agency will use to ensure you are capturing the right data, running the right reports, making positive improvements, and also, it's how you'll know if you are getting a return on the money you're investing in your business operations.

In this section, we will examine three critical components to strategic planning:

1. Goal Setting
2. Technology Enablement
3. People and Process

Executing on these three areas will give your organization the foundation you need to run the Data-to-Wisdom Continuum, and create an agency culture of constant improvement.

Lesson #1: Big, Hairy, and Audacious Goals

Welcome to Lesson #1 – Goal Setting. While fairly simple, it's often forgotten that you need a road map of where you are going in order to get to your destination.

A lot of words get thrown around when talking about goal setting: tactics, strategies, goals, sub-goals, action items, and the list goes on. Before we talk about how to set goals, let's talk about exactly what goes into a goal. There are four components: goal, strategy, objective, and tactic.

Goal: the broad primary outcome you wish to achieve

Strategy: the approach taken to achieve a goal

Objective: a measurable step taken to support your strategy

Tactic: a tool used to pursue an objective connected to a strategy

These terms are important as we'll refer back to these terms when describing the goal-setting process.

Now let's get started and take a look at some of the questions you should ask about your agency during strategic planning, and how those questions relate to goal and sub-goal setting.

In order to frame your strategic planning, you should be thinking about the next three to five years. I give a range of three to five because it depends on how far ahead you and your agency want to think. I prefer three years because of how fast things change in the behavioral health industry, but that's up to you. So, you want to ask of your organization, within the next three to five years:

- What problems is your organization trying to solve?
- What will your organization look like in three to five years?
- What impact will your organization have made on the community?

I'll give you an example of how these questions can help to build a strategy.

So, after answering these questions, an Outpatient Mental Health clinic that wants to focus on improving clinical outcomes for their clients might create the following goal: *The organization will seek to increase the frequency that patients are seen, because they believe that more visits will increase treatment effectiveness and produce positive outcomes.*

The organization would have multiple ways to tackle this goal. Reducing no-show rates for existing clients might be one. Another might be to improve caseload management to allow for greater flexibility in scheduling. These methods will lead to sub-goals and ultimately lead to take positive action.

Jim Collins and Jerry Porras published a book in 1994 titled *Built to Last: Successful Habits of Visionary Companies*, in which they introduced the notion of the “Big Hairy Audacious Goal” or the “Bee-HAG.” It’s a means to align multiple functions of an organization behind common objectives.

BHAG goals are stretch goals. But they should still be achievable in the physical world and they should align with your agency’s mission and service delivery space. For example, don’t set goals for a substance abuse treatment if you are a mental health clinic. It’s fairly simple.

Whatever your goals are, strategic planning should result in a strategic business plan. Write it down. Write your BHAGs down. Put your agency logo on it. Make it official. Psychologically it’s important for everyone in leadership to have something tangible to refer back to when making plans for the future.

You should seek to develop two to four BHAG goals for your organization that are clear, compelling, unifying, and measurable. Keep in mind the measure doesn’t necessarily have to be a large figure. But they should be targets that your whole agency can get behind and contribute towards.

[An example from Jim Collins' blog](#) discusses the clarity of an objective that President John F. Kennedy set for the space program. He told the country that by the end of the 1960s, the United States would put a man on the moon.

He could have said his administration would boost the space program and leave it at that. But his clarity gave NASA a BHAG that the whole country could root for.

The goal number was *one*. Not a large number. It's just *one* man. Where did he need to be? The moon. A clear objective, absolutely compelling, and easy to identify when it is achieved.

Let your BHAGs be your destination, and let your operating plans and sub-goals be the road map to get you there.

So that covers the importance of goal setting and reaching for the moon. In the next lesson, we will talk about how to break BHAGs down into sub-goals and the importance of technology in achieving and measuring them.

Lesson #2: Business Drives, Technology Enables

Welcome to Lesson #2 of The Importance of Strategic Planning. Previously we covered the importance of setting goals, and creating those Big Hairy Audacious Goals that give you a direction to steer your organization.

In this lesson, we're going to talk about breaking those BHAG goals down into smaller bite-sized chunks and how technology can support your goals and objectives in our second lesson: Business Drives, Technology Enables.

In order to implement a strategic business plan, you need to break down the "how." Create an annual operating plan that indicates how you are going to achieve your strategic objectives. It must break down your strategic plan into bite sized chunks that can easily be absorbed by your organization. A lot of change can happen within an organization over a year, but these annual sub-goals need to stay consistent.

It's also important to show your victories along the way. Yearly, quarterly, monthly, and random celebrations are good for employee morale to celebrate the accomplishments you make as you head toward your BHAGs. While you are celebrating, make sure you also remind everyone what your goals are, and how the organization is united in achieving them.

So much of our operating plans incorporate technology for either process support, or data collection, or in many cases both. And that brings us to today's lesson: Business Drives & Technology Enables. Not the other way around.

What this means is that your organizational strategy needs to drive your technology investments. Invest in technology that supports your goals, and avoid the "Wow! That technology is cool!" temptation. You're not implementing technology for technology's sake. It's a means to the end, and the end is achieving your goals.

Consider your organization's internal technology strength. Everyone needs the right technology these days, but there are different ways to deliver it. Do you have an IT staff in house; should you outsource some components, but not others? These are questions that should be considered so that you don't get stuck with technology you can't service that will also slow you down and distract you from your mission.

Plan for regular technology refreshes. As technology advancements continue, you should expect that basic hardware and software upgrades will be necessary. Plan and budget for them. New computers. New operating systems. New servers if you host your own data. Don't wait until your technology completely fails to replace it.

Many behavioral health delivery models are moving outside the office and into the community. Does your technology support home and community based services? Making service providers wait until they are back in the office to update client records is a perfect example of allowing technology to limit your business. Making it possible for them to deliver services and complete their documentation outside of the office is using technology to support your business.

That wraps up our lesson on using technology to support your strategic plan. Stay with us for Lesson #3, where we will evaluate the human element of the strategic plan, and the importance of getting 100% buy in from your people.

Lesson #3: Change the People, or Change the People

Hi there, welcome to Lesson #3: Change the People or Change the People. In our previous lesson we discussed how technology plays a critical role in helping an organization achieve their strategic plan. Today, we'll dive into the importance of getting your staff to buy into that strategic plan.

Once you've established your strategic plan, you need to make sure that everyone in your organization is on the train and headed to your strategic goals. Whatever transportation metaphor you want to use, now that you've established your destination, it's critically important to make sure that everyone is headed there with you and no one is left behind. This means that everyone is ready and willing to arrange a ride to the train station, change a flat tire, or wait for a layover in Atlanta. Because they understand that those adjustments are about reaching strategic objectives that the whole agency believes in.

When you evaluate your team, you want to make sure that you have reliable people who are willing to adapt to changing objectives. Your objectives for the next three years might not be the same objectives for the next two years after that. And in many cases, your strategic planning results in asking your team members to change. You want them to measure up to your organization's needs and expectations.

You have two options, either change the people, or change the people.

If you don't have players who are willing to change their behavior to help support the strategic plan, then they have self-opted out. It's ok for people to not to share your vision, but it's not ok to think that you will achieve your vision with help from people who don't share it.

The next step is to establish a communication plan so that all of your people are aware of the big hairy audacious goals (BHAGs), the strategic plan, the operating plans, and even the IT strategies. Part of this communication plan needs to ensure that you have purity of message among your leadership team.

When employees ask their supervisors questions about the organization's direction, those supervisors need to be able to answer them consistently. And if they can't answer them, you want to have a process in place for those questions to be answered accurately.

True or False? Peers can answer questions about the strategic plan if there's no supervisor. False! You don't want peer to peer answering of questions about the strategic plan because they didn't help prepare it. They may have the right answer, but they also may not, and it's important to ensure that you get 100% of questions about the company's established goals and objectives answered correctly.

It's the only way to be sure that you are able to keep all of your employees informed and united in achieving the organization's goals.

The next operational component to planning is understanding your processes. Don't sell this short. Don't think, "oh, I know that if this person goes here, and if this, then that, then I go take this paper to that person, and they review it before it gets sent upstairs for a final look, and then we're done." Phew (exhausted)

Slow down and create process flow diagrams for all of your functions that are simple and purely repeatable. Purely repeatable processes are going to enable you to collect clean data that is consistent across your organization. In the next section, when we walk through the Data-to-Wisdom Continuum, integrity of data is going to be important, and this is how you'll make sure you're getting it.

There is a complimentary tool for this because process flow diagrams also make excellent training tools for new employees. You can sit them down and use the visual to walk them

through where they fit within the organization, and they can keep them for reference as they continue to acclimate to their new role and their new organization.

We mentioned in the previous section that Business Drives and Technology Enables. These process flow diagrams are the exact mapping that you want to have when you implement your technology. Does your current technology support your process? If it doesn't, you'll want to consider alternate solutions that will.

Now that we have reviewed the importance of strategic planning, in the next section we will talk about how this planning can be put to use, inside the framework of the Data-to-Wisdom Continuum. This will help to ensure that you have all the information at your fingertips to help advance the goals of your organization in positive, and constructive ways.

Section #2: Understanding the Data-to-Wisdom Continuum

Hello, and welcome to Section #2 of the TenEleven Learning Course, Reports Don't Improve Outcomes. In this section, we will be discussing the Data-to-Wisdom Continuum, which is the process by which meaningless data points from the past, become meaningful actions that will result in better service delivery for current and future clients. It is the foundation for discovering deficiencies in your business process, and systematically improving them.

We will walk through the process of first collecting evidence, all the way to applying process changes that you will know empirically improve your outcomes. That way you will be able to **know** that your actions make a difference, and not just assume they do.

Coming up in this section, we will walk through the four stages of the Continuum: Data, Information, Knowledge, and Wisdom.

Data is collecting individual data fields that by themselves are relatively meaningless and represent the past.

Information is combining those data fields from the past and organizing them in the form of a report.

Knowledge is drawing conclusions from your information, and then taking action within the context of your strategic plan.

Wisdom is being able to predict positive results to the business and taking additional action for continuous improvement.

In this section, we will also discuss how often organizations get stuck at the Information Stage and fall into the Chasm of reporting for reporting's sake, and how you can be an organization that takes the Continuum all the way to Wisdom, and predictable positive changes for your organization.

Stage #1: Data – Meaningless Fields From the Past

Are you ready to learn about the first stage in the Data-to-Wisdom Continuum – the Data Stage? Data in its purest form, is an individual representation of some item of history. Data alone is virtually meaningless; however, the collection is critical. The old adage “garbage in; garbage out,” absolutely applies here.

Let's jump in and take a look at the fundamentals of data collection.

Data represents the notional stage of our Continuum. We think we have ideas about what's going on in our business based on observation. But we want to start testing whether we can empirically prove or disprove those notions. We start by collecting data elements that are derived from our strategic plan. Your organization's strategy and goals that we discussed in Section #1 will help you determine what data to collect to indicate whether you're achieving your annual sub-goals which will contribute to your three to five year strategic goals.

The key to data collection is to make as many “discrete” fields as possible. That means you want to resist the desire to have a whole lot of text to describe what's going on. Free form text fields

are virtually impossible to report against. Consider a residential clinic that documents the whereabouts of clients in a free-form text field. Three staff members might document that status differently:

1. Missing
2. Ran Away
3. AWOL

All three mean the individual is unaccounted for, yet if you had three instances of each, your report would not show you nine instances of what you are looking for. Choosing one of these as your organizational nomenclature, and then converting that one into a dropdown selection will produce a discrete data point.

Besides drop-down menus, other types of discrete data collection methods include:

1. Selection Buttons
2. True/False
3. Date Fields
4. Check Boxes

Essentially, anything that eliminates the free typing of the person inputting the data.

Now that can get pretty strict, but there is a way that you can allow for ambiguity in discrete data. It just needs to be done intentionally. It's known as the "other" option. Adding "other" to your discrete data collection is ok, but you should use it methodically.

You should consider whether or not each field deserves an "other" option at all. If it is warranted, you can choose to simply capture "other" as a discrete field. Or you might want to allow a free text field for other. If you choose the second, you want to do so with the intention of reviewing the free text to determine if there are any commonalities that you can join together to add to your discrete drop-down menu, and then begin to reduce the instances that the "other" field is used.

Finally, only collect what you need. Don't collect information because "maybe we'll need it someday." If you think in terms of your organization's strategic plan, you will be able to collect the data you need to execute on the objectives that matter to you. Make sure you have a technology that is flexible enough to add data collection throughout your planning horizon on a "just in time" basis. That way you can create new data capture to support the evolving goals and objectives of your organization.

All of these principles of data capture are designed to ensure what's known as "Fidelity of Data." Fidelity of Data is the foundation for the rest of the Continuum. It means that your data is reliable and will inspire you to take bold steps in the future. It will eliminate questioning when the notions you have about your business are dispelled by the reality that your data presents. You can only achieve Fidelity of Data by only collecting what you need and making sure it is measurable by collecting discrete data.

So, that's how data represents the notional stage of the Data-to-Wisdom Continuum. As we continue, you will discover how your notions are either proved or disproved, and what exactly you can do about it.

Stage #2: Information

Welcome to Stage #2 of the Data-to-Wisdom Continuum, Information. Here, we are going to look at the stage of the Continuum where we take the data we discussed in the previous lesson, and organize it in certain ways to create reports.

The Information Stage is where all the previously meaningless individual data points you captured start to say something. A patient who is 25 years old is now a part of the 35% of the organization's clients who are between the ages of 20 and 30 years old.

We begin to stack those data elements together until they tell us what it is we want to know about what makes the organization run. But how do we determine how to stack the data and what reports to run?

Well, remember back to the process flow diagrams we talked about in the strategic planning phase? For a quick refresher, it's a good idea to visually map out your processes so that everyone can have an understanding of how all their daily activities fit into the overall process of the organization.

These diagrams will reveal which reports to run. Each area of your business will have its own separate measures. It's important to always be working on the various areas of your business to avoid creating sub-optimization.

What that [sub-optimization] means, is that if you work diligently at your intake process to increase the number of clients you bring in, but ignore the clinical capacity, your organization won't be able to keep up. When you have specific areas of the organization running faster than others, this is what we mean by sub-optimization. When using reports to improve areas of your business, it's important to be mindful of the impacts to other areas of your organization as well.

Maybe you have a program that uses an evidence based best practice measurement tool for client outcomes. This would be an instance where running reports are good, but looking at them without the intention of taking action is a mistake. Your strategic plan has guided you so well up to this point. It will continue to guide you into what actions you should take once you interpret the information into knowledge during the next lesson.

Now follow us to the next stage in understanding how to ensure you don't get trapped in the dreaded Chasm. Reporting on outcomes is good, but improving on them for the next report is even better. This is where so many organizations stop, and fall victim to the Chasm of reporting for reporting's sake.

The Chasm!

Now that you have been introduced to the first two stages of the Data-to-Wisdom Continuum, we need to study the Chasm of reporting for reporting's sake so we can learn how to avoid it. Put simply, the Chasm is what happens when you don't have a strategic plan. Your strategic

plan tells you not only what data to collect, and what reports to run, but it expects that you're going to take action to improve your outcomes to get you over that bridge to the rest of the Continuum.

When you don't have a plan, many organizations will stop here at the Information Stage, and continue to run reports for reporting's sake. This is the trap where you continue to run reports and look at them once and just hope that your measures improve, instead of taking the necessary actions that cause them to improve.

Common reasons that organizations fall into this Chasm include: lack of organizational goals, lack of a strategy, lack of planning. All of these reasons fall into the category of not knowing where you are trying to get to as an organization.

The other common cause is data infidelity. In the Data stage of the Continuum we discussed the importance of repeatable processes to create "Fidelity of Data." When you view your reports and you don't trust them, it is very difficult to take bold action to make improvements. If your processes are repeatable and enforced, then you can trust the data.

For example, if your organization has a strategic planning objective to improve care for those with Post Traumatic Stress Disorder, you may choose a PTSD assessment to give to all of your clients. That way you can watch for improvements of your average assessment scores over time. Your report might show that your client average is improving, but you might suspect that many assessments are being missed.

If you don't have, or if you doubt that you have uniform data, you won't be able to confidently display your numbers to, say, a private grant survey foundation that wants to support your efforts around improving clients with PTSD. Uniform data means that each data point was collected in the same environment. For example, if your clinician forgets to administer the PTSD assessment, or a client misses an appointment and receives installment two of the assessment when everyone else is receiving installment three, you no longer have uniform data across the population.

If you suspect this, what you need to do is run a validation report to see how many clients are missing the assessments in order to check the integrity of the data. If the instances of the assessment are too low, then you need to cycle back to the Data Stage and adjust your processes, before you will be able to take actions and advance to the Knowledge Stage of the Continuum that we will tackle in our next lesson.

Stage #3 – Knowledge

Now that you have learned how to collect data, how to turn that data into information, and how to avoid the dangers of getting trapped in the Chasm, you are ready to take your organization to the next stage. Knowledge.

Knowledge is gained when you start to examine the reports you've run, and then draw conclusions in the context of your overall strategy. It's now time to ask your information the question, "why?" Once you identify trends and patterns in your information, you can ask why those trends and patterns are occurring, and then brainstorm what actions can be taken to change them.

You may need to run additional reports or adjust the reporting parameters to drill down deeper for those insights. For example, you may want to expand the time period you're looking at. Or you may want to sort the information from largest to smallest. It's also possible that your information tells you little more than you need to capture different data and then you can come back and revisit the report again later. If your report doesn't tell you anything at all, you might need to revisit the data you are capturing to paint a more accurate picture.

Knowledge is gleaned from reported information, but it should be analyzed in the context of your strategic plan. When you ask your "why" questions you should be asking them in terms of "how does this information support our strategic objective?" Or "what about this information shows obstacles to achieving our strategic plan?"

Your strategic plan should essentially waterfall in this way:

1. Define your strategic objectives
 - a. Define the objectives that will contribute to your overall strategy
 - i. Define the tactics that will determine whether you are achieving your strategic objectives

In the next section, we will review a specific behavioral health example that will consider the following waterfall.

1. Strategy = Interact with clients on a consistent basis to improve outcomes
 - a. Objective = Reduce organizational no-show rates
 - i. Measure reasons for no-shows to take meaningful actions

Now, when you run reports that show deficiencies, you need to reduce the temptation to tackle the low-hanging fruit. Focusing your energy on the items of greatest deficiency will make the largest positive impact on your organization in the shortest period of time.

It's so easy to want to spring into action when you think you can bring a deficiency down to zero. But cutting a large deficiency in half is way more valuable to your agency. Fostering a data-driven culture within your organization will help you celebrate a 50% reduction of an impactful deficiency over a reduction to zero of a less significant deficiency. You'll just need to explain your results, put them in context, and use them as justification for the action you're going to take.

After you take your action, you want to run the report again after a period of time so you can measure the effectiveness of your action, and then begin to determine what to do next.

Taking action on an area of your business, and seeing improvement in the outcome is achieving knowledge. Knowledge is knowing that the area of the business is within your control to improve with thoughtful and strategic action. In the next lesson, we will show you how you can convert your newfound knowledge into wisdom, and make predictable changes to your outcomes.

Stage #4: Wisdom

Welcome to the final stage of the Data-to-Wisdom Continuum. Now that we collected our data, organized that data into information, learned that taking action on that information will improve our outcomes, we are ready to achieve wisdom in one specific area of our business.

Converting our newfound knowledge into wisdom means we are recognizing that change in our applied area is possible, and that we can now use our knowledge to predict how changes to the same objective will result in continuous improvement. After tackling your biggest deficiency first, your organization will be able to say, "since we were able to achieve the desired outcome from our first change, then subsequent strategic actions will also produce improvements toward the same outcome."

By following the Data-to-Wisdom Continuum, you will know empirically, not notionally, that the desired outcome you are trying to reach is achievable. That will give you the confidence to know that your next actions will be worthwhile investments. If you're unable to produce an impact in your largest deficiency, then you have not achieved wisdom. And therefore, you may not want to invest in actions towards additional, smaller deficiencies until you know you can improve on your largest negative return first.

With wisdom achieved, you can continue making changes to your business practice that you know empirically will have positive results. While you may not know what the extent of the return on those changes will be, you do know that the outcome can be improved and that additional investment is justified.

In the next section, we are going to take a look at the application of the Data-to-Wisdom Continuum as it applies specifically to Behavioral Health, while also tracking how a specific organization might use wisdom to improve their no-show rates.

Section #3: Applying Data-to-Wisdom in Behavioral Health [Example]

Stage #1: (Data) Tackling No-Show Rates

Now let's take a look at our example of how an Outpatient Mental Health program might use the Data-to-Wisdom Continuum to improve their contact with clients by reducing no-show rates.

The program enters the first stage of the Continuum by determining what data to collect. To decide, they refer back to the strategic objective they created, which was to positively impact outcomes by increasing the number of client visits. One of the ways the organization plans to implement that strategy is to reduce the amount of no shows.

For a quick refresher, data is individual fields that by themselves, are relatively meaningless and represent the past. The Outpatient Clinic that we are looking at sees that they have a problem with clients missing appointments. They don't know why, they just know that a large number of patients are skipping appointments.

They want to find out why the clients are missing appointments, so they ask clinicians to follow up and see if they can find out why. But before asking clinicians to do so, a new field is going to be created in their electronic health record to capture a "no-show reason." Now, they begin the process of collecting data on the reason appointments are missed.

To ensure the data's collected discretely, the organization creates a drop-down list of reasons someone might miss an appointment. This ensures they have consistency and Fidelity of Data. They have conversations with therapists and clinic directors about why they "think" notionally, clients miss their appointments, and it proves to be a good starting point. The following drop-down list is created from the conversations:

1. Forgot Appointment
2. No Transportation
3. Scheduling Conflict
4. Other

Section 2, Stage #1 of this course about data told us that by including a drop-down menu, the agency can ensure consistency and Fidelity of Data. The organization believes that by decreasing the number of appointment no-shows, they will be able to increase treatment effectiveness, and therefore improve the client's outcomes which aligns with their overall strategic plan.

Now we will look at the organization's results after they collected data for a six-month period.

Stage #2: (Information) Monthly Report on No-Shows by Reason

Now it's time for Stage #2, the Information Stage of the Data-to-Wisdom Continuum for our Outpatient Mental Health clinic.

Before we get started, make sure to remember that information is discrete data fields that have been combined together in the form of a report. For the purposes of this example, we are going to assume that the organization has an electronic health record that can enable them to visualize the data. Reports are going to be much easier to read as visuals than as tabulated numbers.

After six months of collecting data, the organization has a total of 200 no-shows, which confirms their previous notion that clients were missing appointments, but now they also have a breakdown of the reasons why.

First, they noticed that the largest percentage of the no-shows are the result of clients "Forgetting their Appointment." Forgetting the appointment alone equals all three other reasons combined.

Of all the no-shows, forgot appointment represents 50%, no transportation reflects 25%, the "other" option is 20%, and scheduling conflicts make up the last 5%.

Now here at the Information Stage, you want to make sure that you don't stop. To continue tracking these metrics without taking any actions to improve them is falling into the Chasm. To

take no action is to begin collecting data for data's sake. It won't help you improve, and isn't fair to those who you've asked to collect the data in the first place.

The organization takes action on the largest deficiency first, so we can see what results the clinic has in another six months.

Stage 3: (Knowledge) Take Action on the Largest Deficiency

After all the hard work of planning, setting their EHR for data collection, and waiting patiently for a reliable sample size, our Outpatient Mental Health program is finally ready to start making some changes.

Remember from the earlier lesson that, knowledge is where you draw conclusions from your information in the context of your strategic plan. Now it's time for the organization to ask questions of that information: "Why is it that clients are missing appointments?"

Well, it appears that one of the organization's suggested insights was correct. The clients are forgetting their appointments. 'Forgot appointment' is the biggest culprit, making up over half of the no-shows. The next largest percentage is "no transportation," followed by our "other field," and the last is scheduling conflicts. Now, let's see what can be done to improve on that.

The organization decides to implement a phone call reminder system to see if they can reduce the number of appointments missed due to clients' forgetfulness. The organization takes this approach because they want to take action on the largest deficiency first. Doing so ensures that they make the biggest impact on the largest number of clients first. The phone call reminder system will be an automated dialer that will remind the client of their appointment some time period in advance.

After six months of using the automated dialer, the organization runs the same report again, only this time they can see that the overall number of no-shows has been reduced by half!

With the drop in the overall no-show rate, there is also a drop in the percentage of appointments that were missed because of clients forgetting about them.

The knowledge gained here is this: if positive action is taken at the client level, the number of appointments missed will be reduced.

Now the organization realizes that getting clients to show up for their appointments is something that can be improved. They know because they did it.

Now, let's see how they turn the newfound knowledge into wisdom to predict the success of their next action.

Stage 4: (Wisdom) Predict Success and Take More Action

We saw how the organization was able to measure the effectiveness of their phone call reminder system, in reducing the number of no-shows in their program due to clients forgetting about their appointments. Now, they have the wisdom to know that they can affect no-show rates, so they can begin tackling other deficiencies.

The agency's next largest deficiency is a lack of transportation to appointments, so the next step would be to try different things to improve accessibility.

They could institute a transportation plan as part of treatment to have clients plan how they will get to their appointments, or they could provide bus vouchers for individuals that need them.

Whatever they choose as a best course of action, now that they have the wisdom that people will make their appointments if the organization can help them reduce the obstacles driving their investments.

This process of methodically taking actions to reduce your deficiencies is known as draining the swamp. Your largest deficiency will stick out above the swamp line, but when you reduce it, a new largest deficiency will emerge out above the new swamp line. If you keep taking actions

against the deficiencies that are having the largest impact, you will be able to use wisdom to systematically improve your outcomes and achieve your strategic goals and objectives.

Once you have used the Data-to-Wisdom Continuum to reduce deficiencies across all of your business areas, then you can revisit your strategic plan, and begin the process again. We hope that this course has provided you with valuable insight into how you can use the data captured in your EHR, not just to measure your outcomes, but actually improve them.

Remember, Reports Don't Improve Outcomes, you do!