

# Meaningful Metrics: Turn KPI's into Action and Increase Practice Value

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# Disclosure

- Mike Osler is the Director of Business Coaching at 8150 Advisors.

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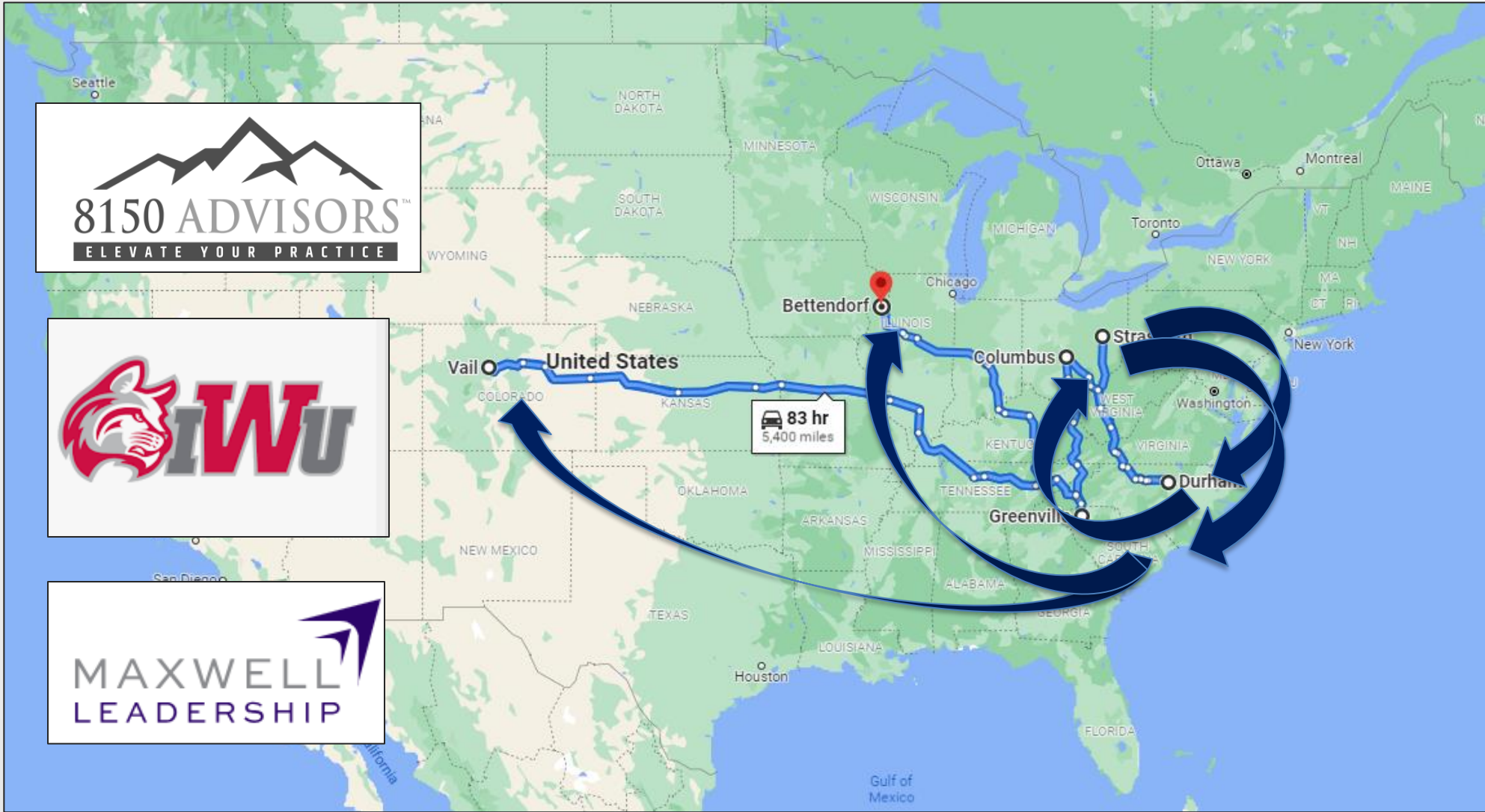
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# Objectives

By the end of this webinar, participants will be able to:

1. Explain the connection between key performance indicators (KPIs), quality care, patient engagement, and team performance.
2. Identify essential operational and financial KPIs that drive profitability and long-term value in a practice.
3. Evaluate when and how to use benchmarking effectively without overcomplicating performance tracking.
4. Apply data-driven strategies, including ROI analysis and execution planning, to coach teams and implement measurable improvements.



# A Petri Dish of Emotional Intelligence

My wife Kim is a pelvic PT

Dad to 4 boys

My goal is to help private practice teams maximize personal & professional value



How willing am I to change  
my behavior in the next 90  
days?



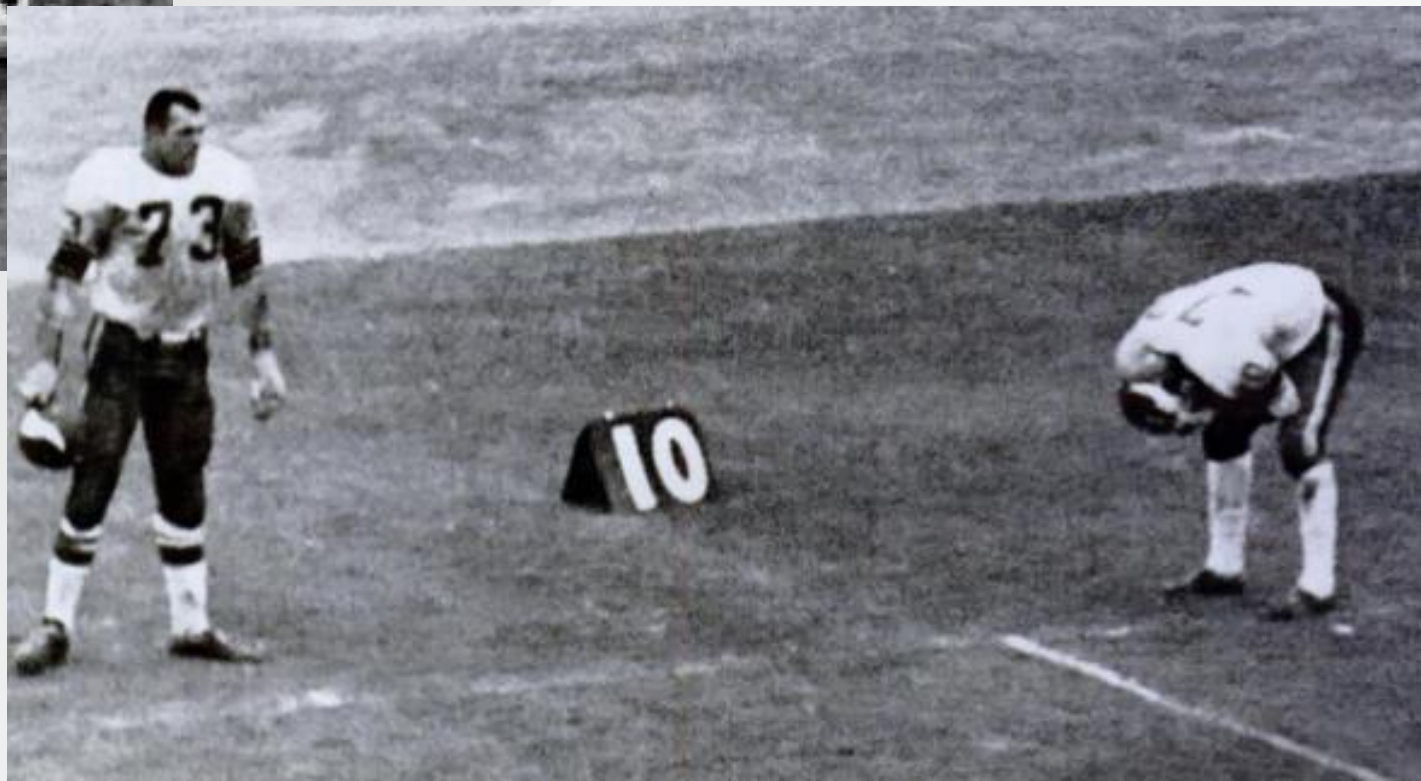
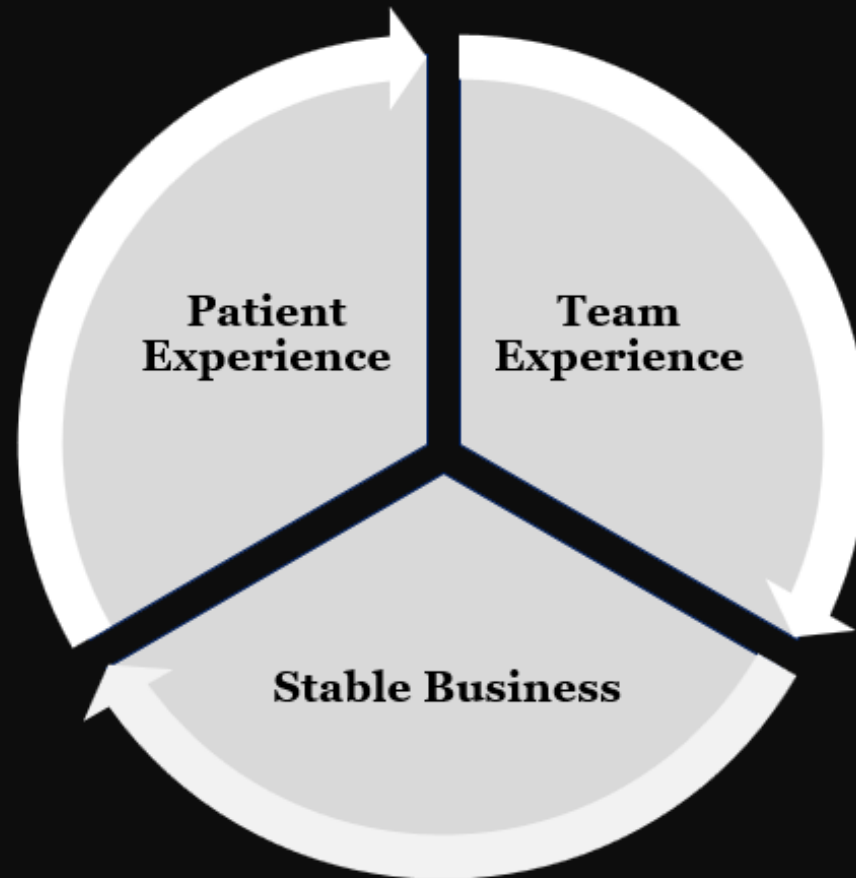


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**EQ: Know Yourself to Grow Yourself /  
Know Others to Grow Others**

**Leadership is influencing the behavior of others to achieve organizational goals**

# Patient Experience

1. Net Promoter Score
2. Patient Outcomes
3. Procedures Per Visit
4. Google / Facebook Reviews
5. Word of Mouth Referrals

# Patient Engagement

1. % Arrival
2. Visits Per New Patient

<i>Key Metrics</i>	<i>Actual</i>	<i>Target</i>	<i>Str/Wkness</i>
<b>Quality Care &amp; Patient Engagement</b>			
Visits per new patient		12.0	
Arrival Rate		90%	
Patient Experience: NPS or Reviews		>90	

# Team Engagement

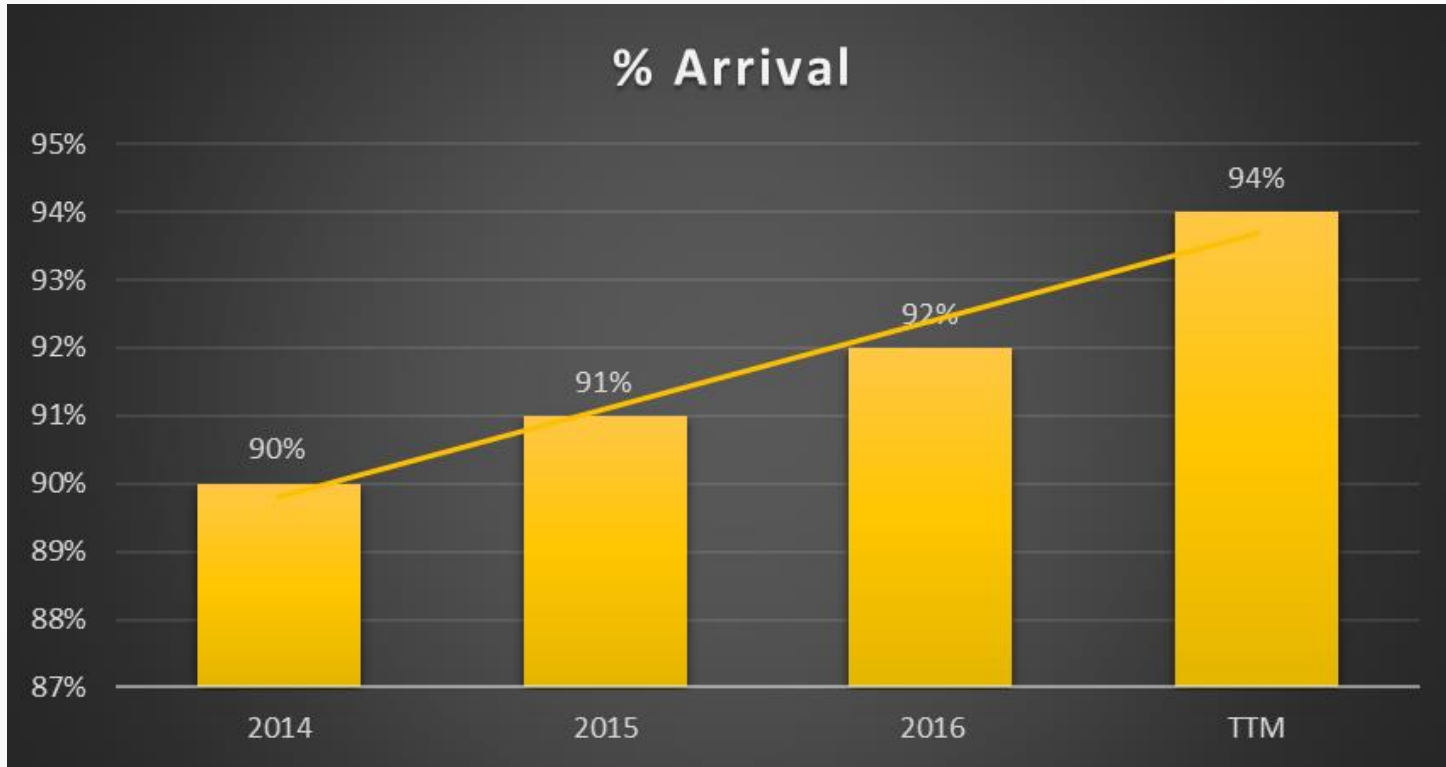
1. Gallup Q12 / Staff Survey
2. Visits per Clinical Hour
3. Procedures per Clinical Hour
4. Team Retention

<i>Key Metrics</i>	<i>Actual</i>	<i>Target</i>	<i>Str/Wkness</i>
<b>Team Engagement</b>			
Retention: annual professional staff retention (PT/OT)		90%	
Team engagement survey: Q12 or other assessment		>4.4	
Recruitment: # of open provider positions (vacancy rate)		<10%	
Conversion rate of new hires		90%	

# Marketing

1. Marketing ROI
2. CAC
3. NP Growth Rate

<i>Key Metrics</i>	<i>Actual</i>	<i>Target</i>	<i>Str/Wkness</i>
<b>Marketing &amp; Promotion</b>			
Same store NP growth over prior year		5.0%	
New patient conversion rate		85+%	
Marketing cost as % of rev (target should be equal or lower than NP growth rate)		3-5%	
NP growth rate / Marketing cost as % of rev *		100%	
Customer Acquisition Cost / Target CAC		\$ 50.00	



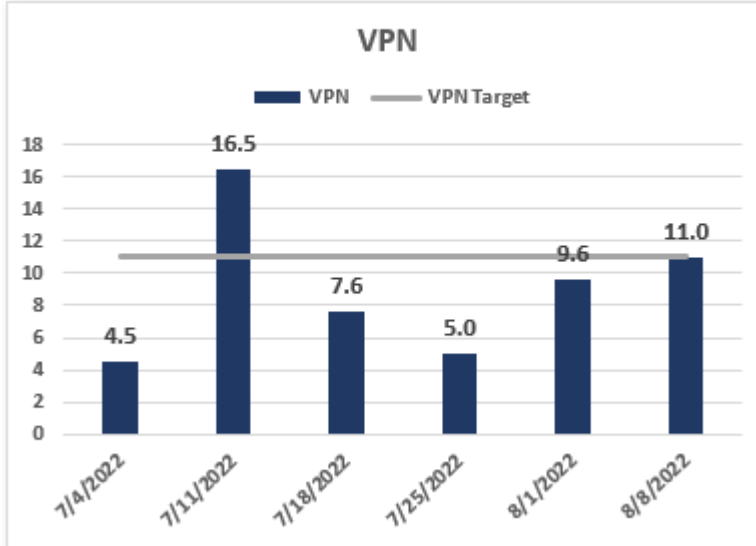
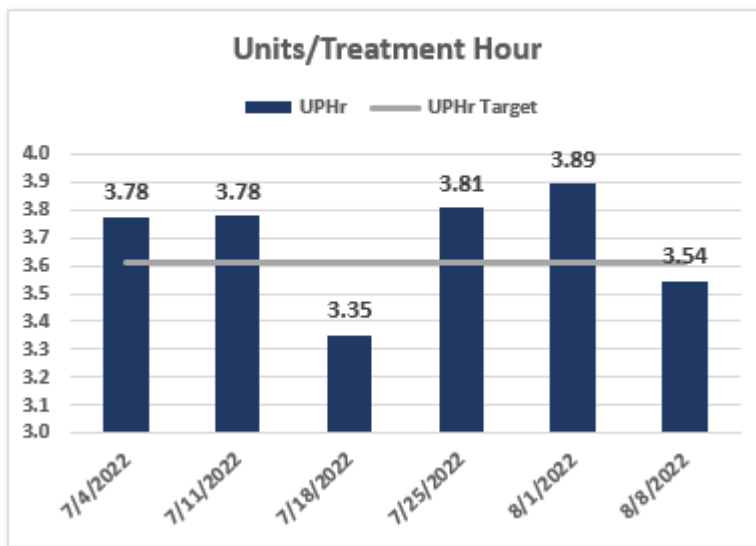
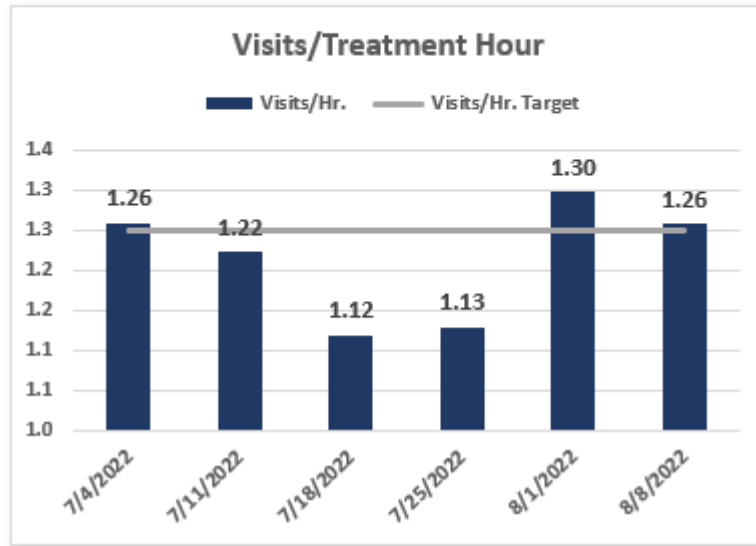
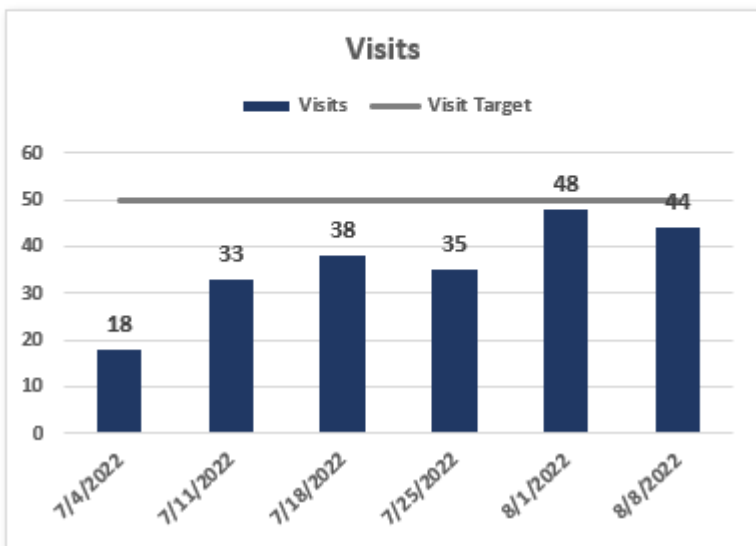
# Graphing Trends

# Weekly Key Performance Indicators (KPIs)

## PROVIDER DASHBOARD: WEEKLY

# Clinician

## Provider 2





School	Championships	Seasons
Alabama	13	1961, 1964, 1965 (AP), 1973 (Coaches), 1978 (AP), 1979, 1992, 2009, 2011, 2012, 2015, 2017, 2020
Notre Dame	8	1943, 1946, 1947, 1949, 1966, 1973 (AP), 1977, 1988
Oklahoma	7	1950, 1955, 1956, 1974 (AP), 1975, 1985, 2000
USC	7	1962, 1967, 1972, 1974 (Coaches), 1978 (Coaches), 2003 (AP), 2004 (AP)†
Ohio State	6	1942, 1954 (AP), 1957 (Coaches), 1968, 2002, 2014

“Don’t think about winning SEC Championships.

Don’t think about winning national championships.

Think about what you need to do in this drill, on this play, in this moment.

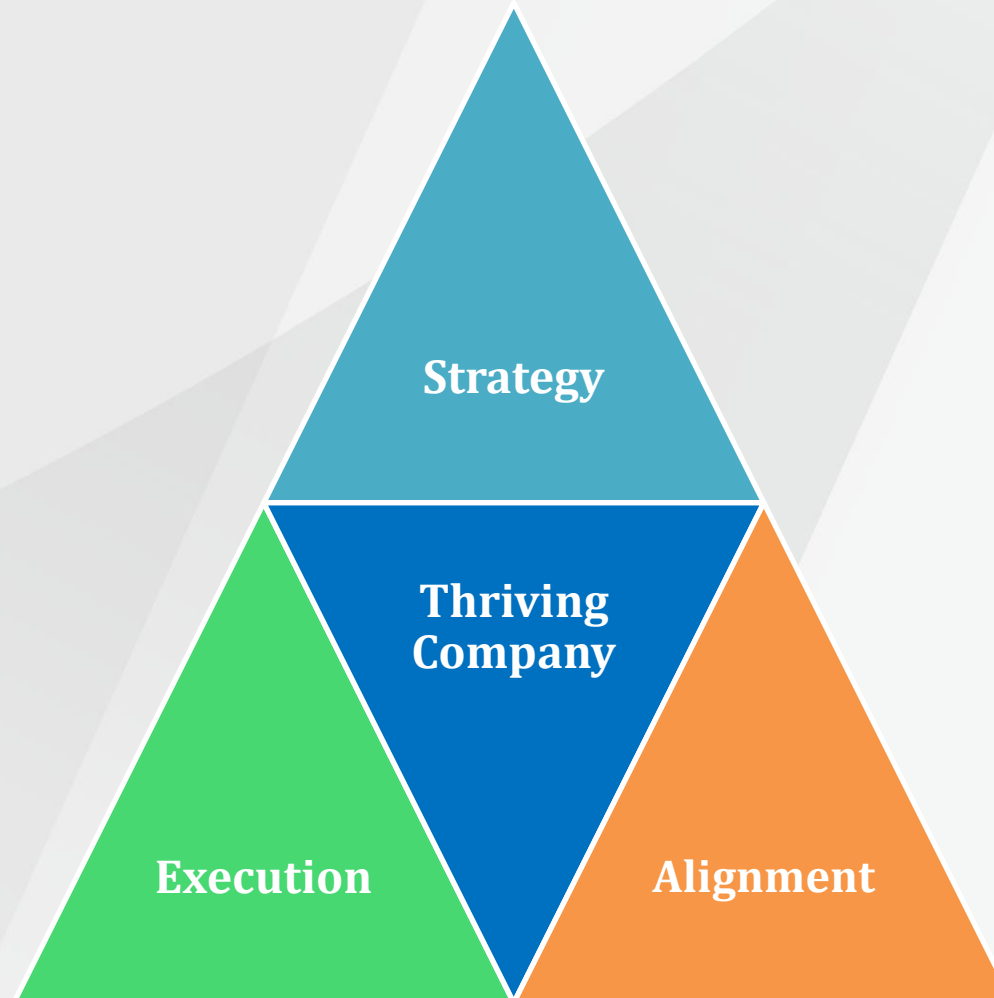
***That’s the process:*** Let’s think about what we can do today, the task at hand.”

– Nick Saban



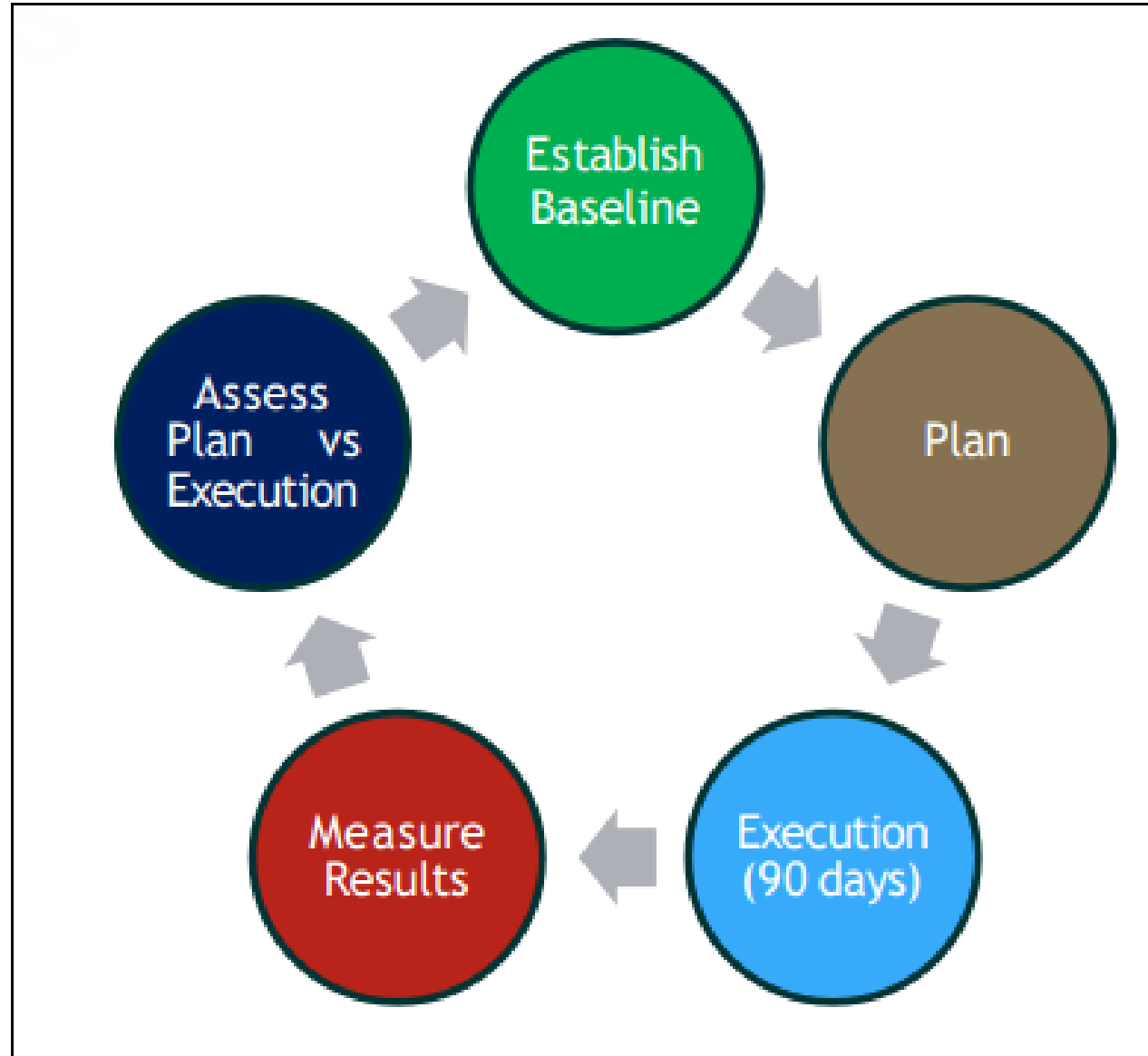
- **#1 - Vision**
- **#2 - Clear roles**
- **#3 - Process**
- **#4 - Pursue lead measures**

# How will this organization thrive in 2025 and beyond?



*“Companies rarely fail for lack of vision. They fail because they cannot translate their vision into execution.”*

*– Jim Alampi*





What resonated the most?

# Take Home Messages



# Homework Challenge



# Questions?

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