

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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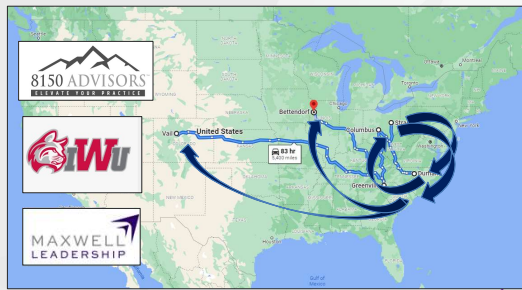
Objectives

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.



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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



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



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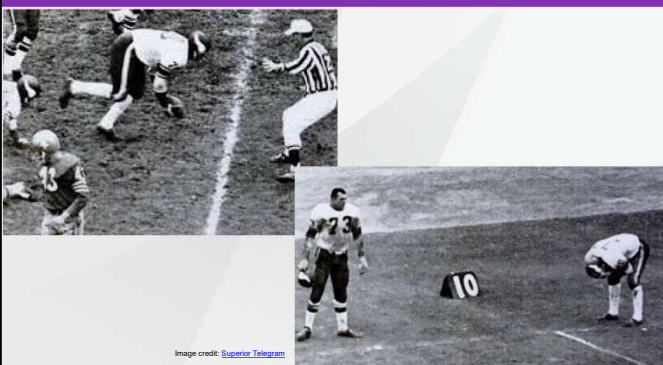
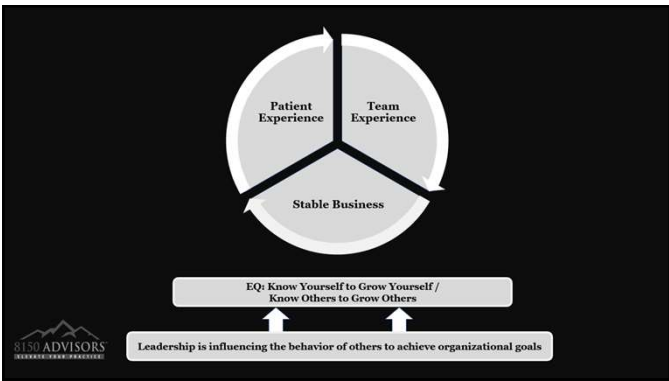


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Patient Experience

1. Net Promoter Score

2. Patient Outcomes

3. Procedures Per Visit

4. Google / Facebook Reviews

5. Word of Mouth Referrals



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Patient Engagement


1. % Arrival

2. Visits Per New Patient



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| Key Metrics | Actual | Target | Str/Wkness |
|------------------------------------|--------|--------|------------|
| Quality Care & Patient Engagement | | | |
| Visits per new patient | | 12.0 | |
| Arrival Rate | | 90% | |
| Patient Experience: NPS or Reviews | | >90 | |



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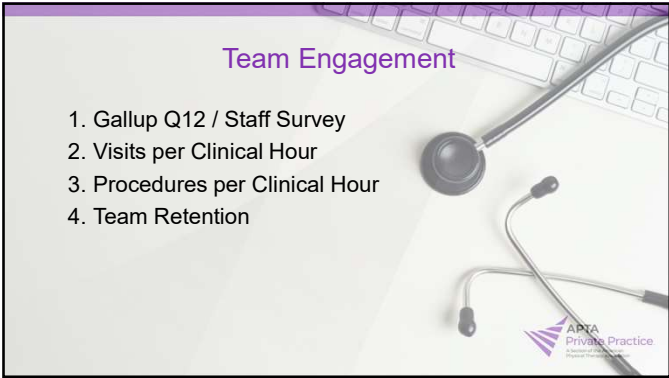
Team Engagement

1. Gallup Q12 / Staff Survey

2. Visits per Clinical Hour


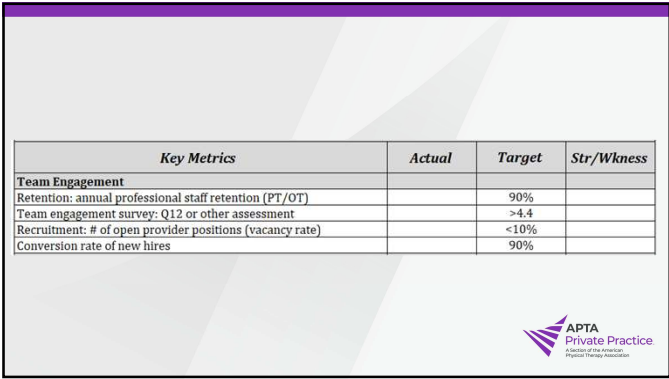
3. Procedures per Clinical Hour

4. Team Retention



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| Key Metrics | Actual | Target | Str/Wkness |
|--|--------|--------|------------|
| Team Engagement | | | |
| 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% | |



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Marketing

1. Marketing ROI


2. CAC

3. NP Growth Rate



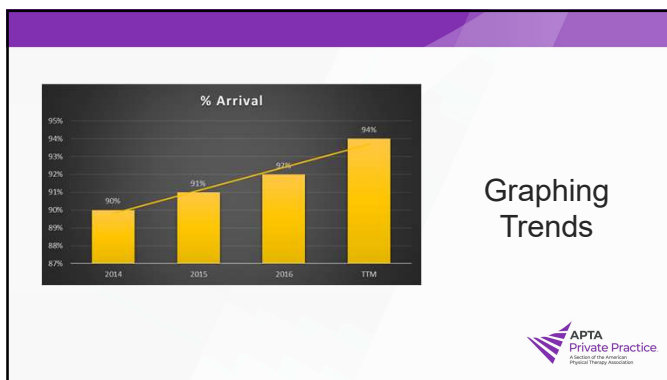
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| Key Metrics | Actual | Target | Str/Wkness |
|--|--------|----------|------------|
| Marketing & Promotion | | | |
| Same store NP growth over prior year | | 5.0% | |
| New patient conversion rate | | 85+% | |
| Marketing cost as % of rev (target 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 | |

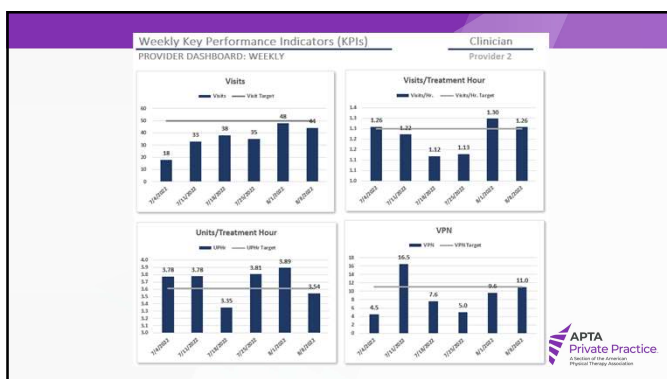


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| School | Championships | Seasons |
|------------|---------------|--|
| Alabama | 13 | 1961, 1964, 1965 (AP), 1973 (Coaches), 1978 (AP), 1979, 1992, 2009, 2011, 2012, 2015, 2017, 2020 |
| Notre Dame | 8 | 1943, 1946, 1947, 1949, 1966, 1973 (AP), 1977, 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 |

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"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



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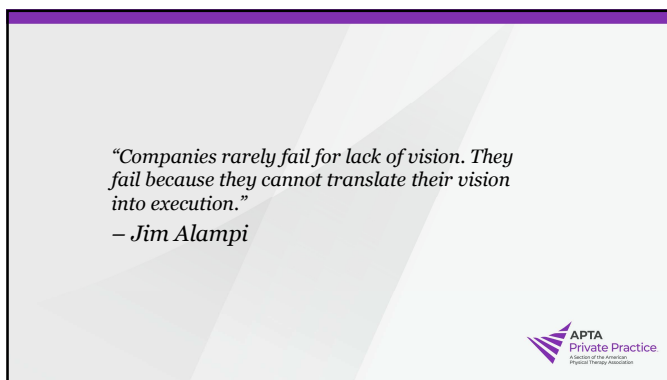
- #1 - Vision
- #2 - Clear roles
- #3 - Process
- #4 - Pursue lead measures



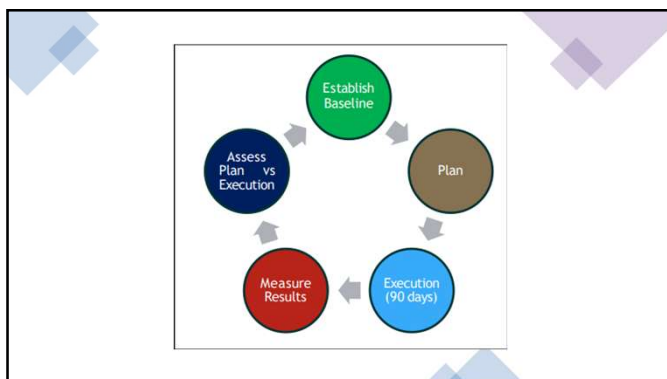
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What resonated the most?



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Take Home Messages






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Homework Challenge





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Questions?

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Scenario #2: Coaching KPI's





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