

## Metric Spotlight: Completed Sessions & Utilization



### Where to Find it

- **Reports** → **Completed Sessions Report**
  - **Completed Sessions** → total sessions completed in the selected time frame; filter by total practice, across clinicians, location, “type,” or supervisor.
  - **Utilization %** → The percent completion out of your goal

### Why It Matters — Use these metrics to answer these questions (and more)

*(Answers to these common questions can be found in the Completed Sessions report).*

- How can I know when it might be time to **hire a new clinician**?
- How can I spot patterns in session completion that help me plan for **seasonal changes**?
- How can I quickly spot who may benefit from **additional referrals**?
- How can I track whether we’re consistently meeting the number of sessions we need as a practice to **reach our goals**?
- How can I make **payroll** (flat rate) or bonus calculations more accurate and less time consuming?
- How do I identify **patterns in utilization** across clinician groups (“type”) so I can make better staffing and growth decisions? *Examples of insights based on clinician “type:”*
  - **Part time vs. full time:** If part-time clinicians rarely meet utilization goals but full-timers consistently do, it may guide whether to prioritize full-time hires.
  - **Specialty:** If child-focused clinicians have higher utilization than adult-focused ones (or vice versa), it can inform what demographic to target in future marketing or which specialties to focus on when hiring.
  - **Experience level:** If newer clinicians consistently run lower utilization than more experienced ones, you may decide to adjust onboarding expectations or create a mentorship structure.
  - **Location:** If utilization is higher at one location compared to another, you might focus marketing efforts and allocate new referrals to the under utilized location.

- How can I tell if our practice is **trending toward growth or decline** in completed sessions over time?
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## Guided Practice: Working With Your Own Data

Use your **Completed Sessions Report** to answer the following prompts. Fill in numbers where you can, and reflect on insights that connect back to your practice's decisions.

### 1. Hiring Decisions

- **Find:** Your **total practice** utilization % over the last 12 months → \_\_\_\_\_%
- **Reflect:** Does this suggest your current team is meeting demand? Might it be time to consider adding a clinician? If utilization is below 70%, consider whether certain clinicians aren't meeting their goals or if it's a team wide challenge.

### 2. Seasonal Patterns

- **Find:** Completed sessions by month (this year, 2024, 2023).
- **Reflect:** What seasonal or monthly patterns do you notice (e.g., summer dips, spring surges)? How might this shape scheduling, hiring, or marketing?

### 3. Referral Needs (Apples-to-Apples)

- **Find:** Compare utilization % by clinician.
- **Reflect:** Which clinicians are below target utilization and may need more referrals? Consider viewing their individual clinician pages to have a better understanding of why they may be falling below their utilization quota (e.g. poor retention, low bookings, not enough active clients, a high cancellation rate)

### 4. Practice Goals

- **Find:** Consider your practice-wide target vs. actual completed sessions for the last quarter.
- **Reflect:** Are you consistently meeting your practice-level goals? If not, what's the gap?

### 5. Payroll & Bonus Payouts

- **Find:** Completed sessions by clinician for the last pay period.
- **Reflect:** Could this process simplify your payroll or bonus calculations?

### 6. Staffing & Growth Decisions by Clinician "Type"

- **Find:** Utilization broken down by groups (choose at least one grouping):
  - Location
  - Type
  - Supervisor
- **Reflect:** What differences stand out? How could this shape hiring, onboarding, marketing, or referral distribution?

## 7. Growth or Decline Over Time

- **Find:** Completed sessions trend line (last 12 months).
  - **Reflect:** Is your practice trending upward, downward, or holding steady? What does that tell you about client engagement and growth?
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## Key Insights

### Key Insights I Gained Through This Exercise:

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