Introducing PracticeVital

Leadership Guide

Why are we using PracticeVital?

PracticeVital is a software tool we are implementing to help us gain a better understanding of how the practice is doing, what's working well, and where we need to make improvements. We'll use the data from PracticeVital to better inform our discussions and as a way to provide more targeted coaching to our clinicians.

Understanding our data and tracking key performance metrics will help our whole practice function more efficiently and effectively. It will ensure our practice is thriving, and that our clients are benefiting as much as possible.

How can every person on our team benefit from this tool?

Clinical Director/Supervisors:

- **Offer Targeted Supervision by Looking at Big Picture Trends:**
  Create an intentional agenda for your supervision time with clinicians. With PracticeVital, you can use data to offer more targeted coaching based on specific trends. For instance, if a clinician is struggling with a high cancellation rate, you can address this by sharing tips to reduce cancellations and help them see the connection between cancellations and client retention. By strategizing around these trends, you can guide clinicians to make impactful, meaningful changes that benefit both them and their clients.

- **Set Goals, Track Progress and Celebrate Wins**
  Use PracticeVital to create concrete goals with your supervisees. Track progress toward goals around client retention or note completion. Recognize milestones to keep morale high.

- **Monitor Performance for Bonuses and Advancement**
  Check if clinicians are on track for their next promotion, bonus, or advancement. Data in PracticeVital allows you to guide them on how to meet those milestones.

- **Improve Client Engagement**
  Use information about retention, cancellations and rebooking to assess whether clients are fully engaged or if adjustments are needed. These insights help ensure clients stay on track to meet their treatment goals. Spot patterns in cancellations or no-shows and guide clinicians to make changes that improve client retention and engagement.

- **Easily Stay on Top of Administrative Work**
  Easily track overdue notes and work with clinicians to manage their administrative tasks efficiently. Celebrate when they hit zero!

- **Manage Caseloads and Scheduling**
  Monitor upcoming bookings to ensure clinicians are meeting scheduling targets. Check their cancellation rate to know how many bookings each clinician will need to schedule to account for their typical number of cancellations.

- **Identify Patterns that May Lead to Burnout and Offer Support**
  A high churn rate can be indicative of a clinician struggling to connect with clients and this can be both a symptom or a cause of burnout. Another metric that can be tied to burnout is utilization rate. If a clinician is consistently exceeding their utilization goal and their churn rate is high as well, this may be a sign that the clinician is at risk of or already experiencing burnout.

Practice Manager: Monitor Active Clients, Rebooking Rate, Upcoming Bookings, and Cancelation Rate to get easy insights into your team's caseload and availability.

- Refer to Active Clients and Utilization to determine general capacity and whether to assign more intakes to a given clinician. Work with your team to keep their rebooking rate high to ensure clients don't slip through the cracks.

- Check out the upcoming bookings to see trends ahead and ensure clinicians are scheduling enough appointments. Use the cancel rate to estimate the number of additional sessions to book each week in order for each clinician to meet their productivity goals.

- Gauge each clinician's need for additional intakes in order to offset likely cancellations. Ex: clinician who is expected to see 20 clients per week and has a 30% cancelation rate, will need to schedule 26 clients in order to stay on track.

- Easily follow up on any outstanding notes.

- Determine need for marketing or additional outreach based on weekly session counts or active client count.

Therapists: Feel empowered with data that brings clarity to what's working and what isn't!

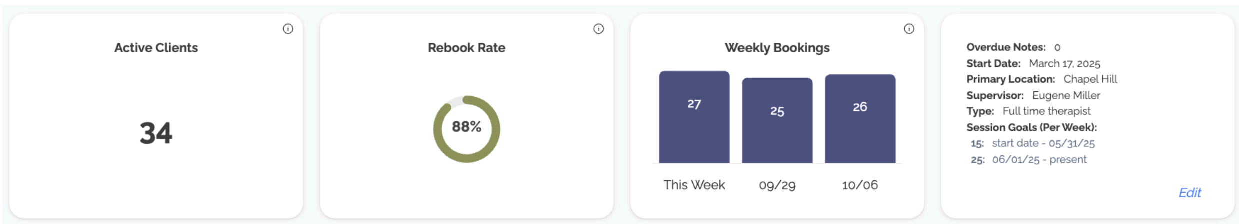
- Easily determine when it makes most sense to take a vacation, whether you're on track to hit a performance bonus or raise or how much you're projected to earn this year

- Make sure you have enough intakes and are scheduling enough appointments to hit your weekly session goal

- Track your daily, weekly, monthly progress and celebrate when you've hit your goals

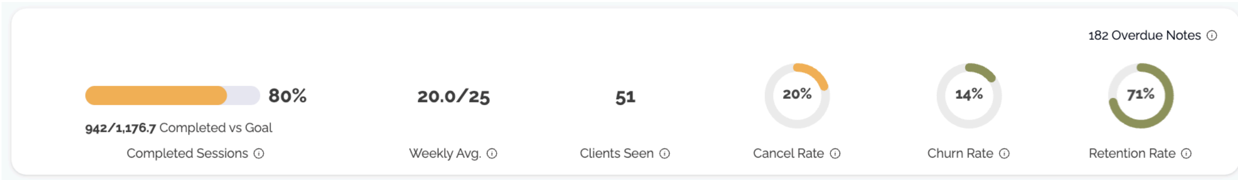
- Learn what you can do to better support your clients, and help them become more "bought in" to the work you're doing
- Watch your overdue notes go down and feel the ping of dopamine when you hit zero!

Why is each metric *vital* to track?



Note that each metric is tracked at both the individual clinician level and practice-wide via the Practice Dashboard.

- **Active clients:**
  - Gives a reliable count of active clients so our intake team has an accurate picture of your caseload.
  - Helps us prepare for additional clients needed. We may need to increase our outreach and marketing efforts if we see that you don't have enough active clients to hit your average weekly session target.
- **Rebooking Rate:**
  - Allows us to account for clients. If low, it may mean we have a high number of terminations. If high, we know our current clients are committing to showing up regularly, and the intake team will scale back on assigning you new clients.
  - Ensures clients aren't slipping through the cracks. If there is no follow up appointment scheduled, it's easy for clients to let several weeks (or months!) go by without a session. Weeks without a session interferes with the momentum needed to make progress towards goals.
- **Upcoming Bookings:**
  - Check out the upcoming bookings to know how sessions are trending and to ensure clinicians are scheduling enough sessions to meet their productivity goals.
  - Use this number in combination with cancellation rates to know how many additional appointments are needed in order to meet your practice wide session goals.



- **Cancellation Rate**:
  - Helps us determine the amount of additional sessions we need to schedule in order to buffer for cancellations.
  - A high cancellation rate may indicate low client and/or therapist engagement. If a therapist has a high cancellation rate, it may signal they're struggling with burnout or that other areas of their life are interfering with their ability to fully "show up" for their clients.
  - Allows us to track practice wide trends that inform scheduling and time off.

- **Retention**:
  - Retention rate looks at the percentage of clients, within a given time frame, that stay for 8 or more sessions.
  - Research defines, "minimally adequate treatment," or the minimum number of visits to achieve beneficial outcomes, to be 8 or more therapy sessions. In other words, clients need to have eight therapy sessions, at a minimum, in order to achieve their goals.
  - If retention is high, it signals a strong therapeutic relationship, positive client engagement and satisfaction with the work
  - Retention points to patterns of client dependency. There's an ideal space between "too few sessions to make progress" and a client who stays in therapy forever
  - Clients who are "retained" at 8 or more sessions are more likely to refer others to our practice due to meeting their treatment goals and having a positive experience
- **Churn**:
  - Churn is defined as the % of clients who terminate before their 4th session (so they only stay for 1-3 sessions)
  - Churn rate is known as the "revolving door" metric– meaning clients come in and don't stick around

    - If a clinician is frequently churning through clients, they won't feel as successful. We all want to feel we're doing good work and really helping our clients.
    - A high churn rate may indicate a poor fit in terms of the clients that are being assigned. Explore trends with clinicians who have a high churn rate to make sure you're making optimal matches or to provide additional clinical training to better match the presenting issues of clients that are being assigned.
    - A high churn rate is correlated with therapist burnout. You may want to check in more frequently with therapists who are showing a high churn rate.

How to help our team embrace this new data: *Talking Points*

- Data is our friend. This data helps to ensure our whole practice is thriving!
- Ensures we're providing continuity of care for clients. If cancellation rates are high or retention rates are low, we are not helping our clients to the extent that is possible.
- Flags which therapists need more clients, when to increase outreach, and how to keep caseloads full.
- Helps us spot trends so we can better support you. We may see information that tells us you're close to burnout. We may see a retention issue as a mismatch in terms of the types of clients we are assigning to your caseload.
- Ensures we're running a sustainable business that will last into the future!
- Having easy and frequent access to your own data keeps you informed and *empowered*.
- We want to ensure the work that we're doing is helping clients.
- In most industries, employees know how they are doing. Therapy is really unique in that it's all behind closed doors. Data lets all of us know how things are going. You deserve to know what's working and what isn't!
- Learn specific strategies to help you better support your clients.
- You can use this data to plan for time off, project your income for the year, know if you're on track to get a bonus or a raise.
- Spot any concerning trends early on. There shouldn't be any surprises at an annual performance review or any surprise "PIPs."
- Recognize and celebrate things that are going well ("Wow, you had 10 missing notes last month and this month all your notes are in on time! Way to go!")

- It feels good to set goals and to know when you’re meeting expectations.
- Retention data will help us make sure we’re making the best client/therapist matches possible – which ultimately helps to reduce burnout.
- We can use this data to help more people!