



## Seminar Toolkit

**Building A Data-Driven Organization: The  
2026 *OPEN MINDS* Seminar On Making  
Metrics-Based Management Work**



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# Building A Data-Driven Organization: Making Metrics-Based Management Work: Seminar Toolkit



Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

Thank you for downloading The *OPEN MINDS* Seminar Toolkit, a supplemental guide to [Building A Data-Driven Organization: The 2026 OPEN MINDS Seminar On Making Metrics-Based Management Work](#), a signature part of [The 2026 OPEN MINDS Performance Management Institute](#).

Becoming a data-driven organization isn't just an advantage, it's a necessity. In today's competitive landscape, health and human services organizations must demonstrate value through data while using it to fuel smarter decisions and stronger outcomes, clinically and operationally.

Within the toolkit, you'll learn how to make data your organization's greatest competitive advantage. Discover the tools and tactics to transform raw numbers into actionable insights, inspire accountability across teams, and accelerate performance where it matters most.

Then, on February 10, 2026, join Michael Allen, Executive Vice President at *OPEN MINDS*, for the in-person seminar featured at [The 2026 OPEN MINDS Performance Management Institute](#). Our industry expert will discuss how your organization can transform into a data-driven leader.

I hope you will take advantage of all the toolkits and seminars offered, and feel free to reach out to [mallen@openminds.com](mailto:mallen@openminds.com) with any questions on how your organization can use data for greater sustainability.



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# Reinvention—How To Choose Wisely

By Monica E. Oss, Chief Executive Officer

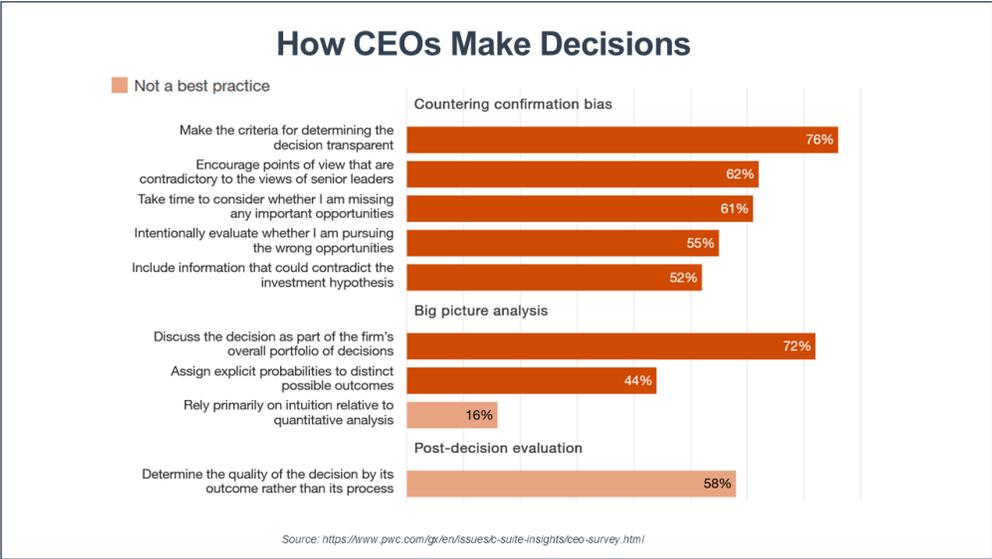
The health and human service market is changing. My colleagues Jon Evans and Paul Duck recently spoke about the change drivers and the implications (see [Successfully Managing Through Chaos: Perspectives For Health Care Policy & Market Trends In 2025](#))—and the uncertainty in the field today. The problem is that the current change is chaotic—and in many ways defies traditional executive decision-making practices.

So, how are C-suite executives choosing to

reinvent their organizations in the face of this change? And how are they making those decisions? That was the focus of an analysis of a recent chief executive officer (CEO) survey, [Reinvention On The Edge Of Tomorrow...](#)

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# 10 Rules For Aligning Data & Excellence

By Joe Naughton-Travers, Ed.M., Senior Associate

Data and analytics are the preeminent tools for executive teams looking to prove their “excellence” with great consumer experience, superior quality of care, and reduced costs. Doing this well is critical to gaining a preferred relationship with payers and—if it fits an organization’s strategy—becoming a center of excellence (COE).

This month, as we concentrate on COEs, it’s crucial to acknowledge that the criteria for demonstrating an organization’s “excellent” status closely align with the original “balanced scorecard” introduced by Robert S. Kaplan and David P. Norton in 1992. That concept looks at metrics in four different ways—how customers

see you, what you are great at, how you can improve to create value, and how financially strong you are...

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**The Right Data To Manage Strategy & Performance:  
The Ten Rules For The Right Data**

- Rule #1:** Do identify the different audiences for your performance data & how they will use it.
- Rule #2:** Don't confuse strategic performance metrics with operational performance metrics.
- Rule #3:** Do select a balanced set of metrics for your Strategy Performance Dashboard to be used by the board of directors and executive team.
- Rule #4:** Don't worry about the data presentation yet – the “dashboards.”
- Rule #5:** Do extend data-driven decision-making throughout your management team with an Operations Performance Dashboard.
- Rule #6:** Don't invest in new technologies & operations unless it helps improve critical customer performance.
- Rule #7:** Do add performance-based elements to employee compensation.
- Rule #8:** Don't try to be good at everything – just the measures important to the customers you want to service.
- Rule #9:** Do share selected performance data with external stakeholders.
- Rule #10:** Don't forget that leadership needs to maintain relentless focus on the performance that matters.

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# The Human Factor In Data-Driven Decisionmaking

By Monica E. Oss, Chief Executive Officer

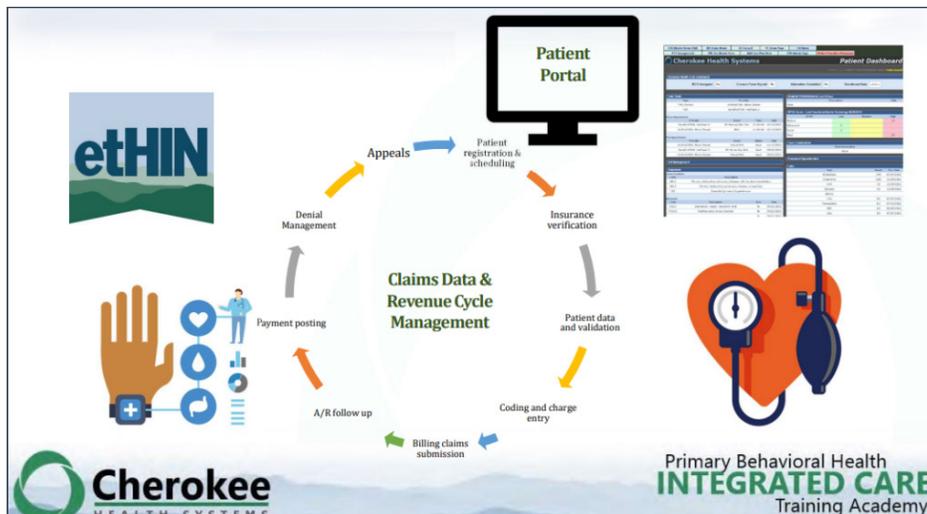
Effective whole person care requires data sharing. It has taken awhile, but federal policy makers at the Office of Policy of the National Coordinator for Health IT (ONC) and the Substance Abuse and Mental Health Services Administration (SAMSHA) are looking to revamp electronic health records systems to be friendlier towards behavioral health needs. That was the focus of the remarks of Thomas Novak, Senior Advisor on State and Medicaid Policy for the Office of Policy in the Office of the National Coordinator for Health IT, last month at HIMSS (see [Interoperability Of Behavioral Health Data A Priority For 2024](#)).

data doesn't move efficiently and isn't easily accessible throughout the health care system. He attributed this situation to adoption and optimization issues...

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His observation was that behavioral health





# Becoming A Data-Driven Organization: A 12-Step Roadmap For Executive Teams

By Dee DeWitt, Senior Associate

In an increasingly volatile health and human services market, the ability to respond to change with agility and evidence is no longer optional. Market disruptions, shifting payer models, workforce challenges, and consumer expectations require data: reliable, timely, actionable data. Payer contracts are tying reimbursement to measurable outcomes. Consumers are making decisions based on ratings, reviews, and comparative data. Boards are expecting more transparency and accountability. And internally, organizations are being pushed to do more with fewer resources—faster, more efficiently, and with

greater impact.

But becoming a data-driven organization isn't just about dashboards or metrics...

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**The Foundation: Metrics-Based, Data-Driven Management Practices & Culture**

- 1 Market-Driven Strategy & The Metrics Of Success
- 2 C-Suite Technical Assistance – Linking Strategy To Metrics
- 3 The “Wish List” Of Metrics – Prioritized With Feasibility Assessment
- 4 Select The C-Suite Base Metrics Set
- 5 Operationalize The C-Suite Base Metrics Set In An Automated Format
- 6 Practice Data-Driven Decision Making At The C-Suite Level
- 7 Add High-Value Metrics That Require Investment (The ROI Question)
- 8 Extend Data-Driven Organizational Decision Making – With Transparency
- 9 Organization-Wide Education On Using Metrics In Service Delivery
- 10 Add Performance-Based Elements To Team Compensation
- 11 Share Selected Performance Data With External Stakeholders
- 12 Share Real-Time Performance Data With Partners

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# 5 Rules For Selecting Performance Management Measures

By Monica E. Oss, Chief Executive Officer

One important piece of human resources performance management is deciding what measures your team should use to guide strategy and develop performance management programs. This is no small issue and starts with selecting the aspects of performance that deserve management team attention. When selecting performance management measures, the biggest rule of thumb is to choose specific, measurable metrics that are aligned with your organizational goals and are easy to use.

Beyond that, metric selection can get very complicated, very quickly. To keep it relatively simple, here are the five basic rules for selecting performance management measures:

1. Less measures are better than many.
2. Start with the c-suite level measures first.
3. The measures should answer the question: Is our strategy working?
4. Leading indicators are better than lagging indicators.
5. Don't use measures that require manual calculation.

**Less measures are better than many.** When management teams either start a new process or refine the current one around performance management, the tendency is to use lots of measures. The result is a program that is both unwieldy and confusing. Instead, executive teams should use six to ten performance domains and no more. These can be acquired by letting team members nominate measures and then pruning the list down to 10 or fewer from there using five key domains: high-performing on payer contracts, cheap and easy, customer service, clinically cutting edge, and financial sustainability...

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# Should You Kill Your Organization?

By Monica E. Oss, Chief Executive Officer

Earlier this week, I got an email with the subject line—“Should you be trying to ‘kill’ your company?” In the article, [I’ve Been Paying A Team To Kill My Company](#), the author advocates for the creation of autonomous business units (ABU) in order to help organizations make innovation happen.

The ABU concept—what I refer to as a “skunk works”—is a business unit with a business model entirely distinct from the parent organization. The customers are different. And the customers are served with a different value proposition and profit formula, supported by

independent resources and processes. It’s not just a separate division or unit operating under the incumbent model. It’s fully autonomous...

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**New Business Models Emerging For An Integrated, Value-Based, Tech-Enabled, Health Plan-Dominated Health System**

**Delivery System Stress**

**Emerging New Business Models**

- 1 Payvider (at-risk delivery system)
- 2 Bundled rate/case rate services
- 3 APM-paid community-based services
- 4 Tech-enabled consumer service competing on experience

**Key Business Model Questions**

A business model describes how an organization creates value – the specific ways it conducts itself, spends, and earns money in a way that generates profit.

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# Improving Your Choices: Models For Data-Driven Decisionmaking & Metrics-Based Management

**Facilitator: Carol Clayton, Ph.D., Senior Associate**

This presentation took place at The 2023 *OPEN MINDS* Executive Leadership Retreat. Attendees heard from Ellen McGuirk, MBA, Chief Executive Officer, South Coast Community Services and Theresa Costales, M.D., Arizona Medical Director, Connections Health Solutions. Attendees heard from provider organization case studies on models for tracking key performance indicators (KPIs) and metrics-based approaches, using performance-based dashboards to help guide organizational decisions, and ongoing evaluation of metrics and timelines for review of KPIs.

*Presented At The 2023 OPEN MINDS Executive Leadership Retreat – Industry Resource, September 16, 2023 — [openminds.com/market-intelligence/resources/improving-your-choices-models-for-data-driven-decisionmaking-metrics-based-management](https://openminds.com/market-intelligence/resources/improving-your-choices-models-for-data-driven-decisionmaking-metrics-based-management)*

**View & Listen**

### Three Models For Decision Making

- Kellogg Logic Model
- Objective Key Results (OKR) Model
- OPEN MINDS* Model

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# Optimizing Strategy & Operations With Metrics

By Joe Naughton-Travers, Ed.M., Senior Associate

By making a conscious effort to rely on data to drive their decisions, executive teams will be in a better position to direct their organization toward positive change. And in this current market, the executive team that can make better, faster decisions is the executive team that is most likely to succeed.

In successful organizations, metrics-based management happens in two contexts: managing strategy implementation and optimizing business operations. The key is to ensure the availability of the right data and the

implementation and maintenance of the right analytical tools to report these performance metrics....

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### Managing Strategy Implementation

- 1 Start With The Strategic Plan**

This plan should have a short list of quantifiable strategic objectives, initiatives for accomplishing them, timelines, assignments, and budgets.
- 2 Select Metrics For Success**

These are KPIs calculated from obtainable data that indicate organizational performance in progressing toward and accomplishing strategic objectives. An effective KPI is specific, measurable, and actionable.
- 3 Create A KPI Reporting System**

Ideally, this is from a business intelligence (BI) or data analytics software application that includes management dashboards to report the metrics, showing a comparison to the performance trend from past to present.
- 4 Coach Staff To Use The KPIs**

Engage in ongoing monitoring and proactive management using the KPIs with the executive team and staff. Modify the KPI metrics if needed to ensure progress in implementing organizational strategy.

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# The Data Fix

By Monica E. Oss, Chief Executive Officer

2023 has been a year of turbulence in health care. The post-pandemic landscape has seen margin compression due to flat rates and rising costs, along with increased competition (see [The Changing Behavioral Health Market Landscape: Implications For Consumers, Providers, Payers & Investors](#)). The result has been a spike in reorganizations (see [Healthcare Sector Bankruptcies Are On The Rise](#) and [Healthcare Sector Bankruptcy Filings Surge In 2023, Trending To Triple the Levels Of 2021](#)).

address these challenges and navigate these trying financial times. The key is understanding organizational performance in real time—and addressing performance problems as proactively as possible...

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The question for executive teams is how to

**Real-time data and metrics prioritization improved quality of care and member satisfaction** © Connections Health Solutions – Proprietary and Confidential

What matters to the person seeking treatment? What matters to the community crisis continuum stakeholders?

Program	9/1/2022	10/1/2022	11/1/2022	12/1/2022	1/1/2023	2/1/2023	3/1/2023	4/1/2023	5/1/2023	6/1/2023	7/1/2023	8/1/2023	Total
<b>Observation</b>													
★Community Disposition %	49.20%	36.69%	36.54%	38.00%	39.45%	38.78%	36.70%	41.14%	39.66%	39.43%	43.50%	44.43%	40.31%
★Conversion Rate	71.09%	61.33%	58.62%	62.93%	54.41%	62.50%	57.18%	62.78%	59.95%	62.82%	61.45%	52.72%	60.57%
★Door to Doc	18m 00s	18m 00s	15m 00s	06m 00s	07m 00s	08m 30s	07m 00s	07m 00s	10m 00s	17m 00s	27m 30s	25m 00s	13m 50s
★Door to Med Rec Completion	03h 03m	03h 00m	02h 50m	04h 05m	04h 06m	04h 39m	06h 25m	05h 31m	05h 08m	05h 30m	05h 04m	05h 47m	04h 35m
★Police Wait Times	03m 09s	03m 20s	03m 23s	03m 53s	03m 46s	06m 05s	06m 46s	08m 38s	05m 39s	05m 12s	04m 55s	05m 22s	05m 04s
Internal IP Transfers	35.26%	43.32%	50.13%	45.57%	46.09%	51.17%	48.33%	43.36%	41.83%	40.00%	34.01%	38.66%	43.40%
Length of Stay	01d 00h	01d 01h	20h 05m	22h 37m	01d 01h	01d 02h	01d 05h	01d 04h	01d 02h	01d 04h	01d 04h	01d 04h	01d 02h

①

**Door-to-doc time**

- Patient experience
- Immediate access
- Treatment begins immediately

②

**Police wait times**

- Customer Service
- Community Support
- Encourages Right Intervention at the Right Time

③

**Conversion to voluntary**

- Patient experience and outcome improves with agreeing to treatment
- Every team member is trained to help ensure future success

④

**Community disposition**

- Goal to treat patients in least restrictive environment possible
- Get patients back to their lives as quickly as possible



# Success With Integrated Data Sharing: The Cherokee Health Systems Case Study

By Dee DeWitt, Senior Associate

For provider organization executives who are leaning into data gathering, analytics, and metrics-based management, the foremost question isn't what they will do with the data but where it will come from. Since health care produces approximately 30% of the world's data volume (see [How To Harness The Power Of Health Data To Improve Patient Outcomes](#)), most executives will immediately find many sources to answer that question, including electronic health records (EHRs), administrative claims data, patient-reported outcomes (PROs), patient-generated health

data, health information exchange data (HIE), and information from a long list of internal administrative systems...

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**Building The Team**

-  **IT & Clinical Teams Integration**
-  **Speaking 2 Different Languages**
-  **IT & Clinical Collaboration**
-  **HIT Toolkit Development**

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