



Seminar Toolkit

**Best Practices For Investing In Technology & AI:
The 2025 *OPEN MINDS* Executive Seminar
On Maximizing Your Tech's ROI For Future
Competitive Advantage**

Best Practices For Investing In Technology & AI: Maximizing Your Tech's ROI For Future Competitive Advantage: Seminar Toolkit



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

Thank you for downloading The *OPEN MINDS* Seminar Toolkit, a supplemental guide to [Best Practices For Investing In Technology & AI: The 2025 *OPEN MINDS* Executive Seminar On Maximizing Your Tech's ROI For Future Competitive Advantage](#), sponsored by Core Solutions, a signature part of [The 2025 *OPEN MINDS* Technology & Analytics Institute](#).

Technology investment has become a top priority as provider organizations face growing demand, workforce challenges, and rising expectations for digital access. With many providers still relying on outdated or limited systems, the right technology can expand access to care, streamline operations and improve clinical outcomes. Leaders must consider how tech investments align with their organization's strategy, the financial return on investment, and which solutions best support long-term sustainability.

This toolkit is designed to guide you through evaluating the value of technology, identifying the areas where investment can have the greatest impact, and aligning those choices with both consumer needs and organizational goals.

Then, on October 21, 2025, join Paul M. Duck, Chief Strategy Officer and Benjamin Smith, Executive Vice President at *OPEN MINDS*, for the in-person seminar featured at [The 2025 *OPEN MINDS* Technology & Analytics Institute](#). Our industry experts will guide you through a guidance needed to future proof your organization and lead with confidence in an increasingly digital health landscape.

I hope you will take advantage of all the toolkit and seminar offered, and feel free to reach out to pduck@openminds.com or bsmith@openminds.com.

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Technology-Enabled Financial Health: A Strategic Framework

By Market Intelligence Team

In today's health care environment, the effectiveness of a provider organization's technology infrastructure is not measured by the value of individual platforms alone but by how thoroughly the array of systems integrates to enhance financial, clinical, and operational performance. Fragmented systems that silo information fail to equip leadership teams with the visibility into data, metrics, and analytics needed to develop the insights that drive strategic decision-making. Executives leading provider organizations require cohesive, integrated technology tools that together form an information ecosystem.

To help assess, build, and optimize a technology platform that can support both current operations and long-term strategic objectives, executive teams can use this comprehensive six-domain framework to achieve necessary data integration and visibility...

Previously Published – CFO Newsletter Article, September 22, 2025 — openminds.com/cfo-newsletter/technology-enabled-financial-health-a-strategic-framework/

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Six-Domain Framework To Achieve Data Integration

Domain #1: EHR & Billing

- Can your EHR manage clinical documentation, billing, and revenue cycle management (RCM) across all services?
- Is it interoperable with external systems?
- Does it offer mobile capabilities?

Domain #2: HRIS & Financial Systems

- Does the HRIS support applicant tracking and learning management?
- Can the financial system calculate unit and case costs?
- Is contract management integrated?

Domain #3: Hybrid & Community-Based Services

- Are secure and HIPAA-compliant telehealth and EVV systems in place?
- Can remote tools monitor vital signs and health metrics as needed?

Domain #4: Consumer Engagement

- Is scheduling centralized and accessible? Is self-scheduling available?
- Can consumers communicate via portals and secure channels?
- Are satisfaction metrics like NPS in use?

Domain #5: VBR Performance

- Are payer and consumer performance metrics being tracked to meet required reporting?
- Can you monitor hospitalizations, follow-ups, and readmissions?

Domain #6: Analytics & Optimization

- Are systems integrated to allow cross-platform reporting?
- Do leaders have access to real-time dashboards?

The Tech Disconnect

By Monica E. Oss, Chief Executive Officer

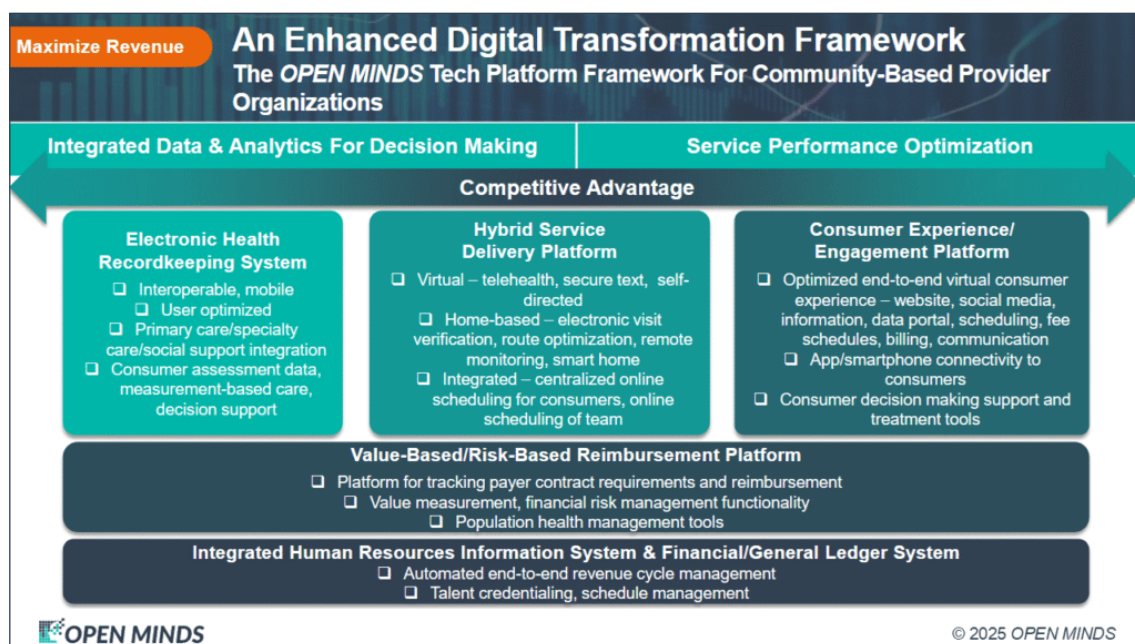
If digital transformation is essential to growth in health and human services—and in the first quarter of 2025 alone, digital health startups secured \$3.0 billion in funding (see [Digital Health Startups Raise \\$3 Billion In The First Quarter Of 2025](#)) why is tech adoption in the field so spotty? My take—it has a lot to do with the reimbursement.

A recent analysis, [Experiences Of Telehealth Reimbursement Policies in Federally Qualified Health Centers](#), is just one of many studies that point to the need for reimbursement changes to fully leverage technology in the health

care system. “Although telehealth brings new opportunities to advance patient-centered care, there are serious challenges on the path toward equitable care because telehealth is not yet integrated into payment in a sustainable way...”

Previously Published – Executive Briefing, May 31, 2025—openminds.com/market-intelligence/executive-briefings/the-tech-disconnect/

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The AI Leadership Challenge

By Monica E. Oss, Chief Executive Officer

With all the discussion of AI, it's hard to get a snapshot of where the business world is with it. Recent data from a new book—*Superagency In The Workplace: Empowering People To Unlock AI's Full Potential*—shows that 92% of organizations plan to increase their AI investments, and 94% of employees and 99% of C-suite leaders are already familiar with AI tools.

Not surprisingly, demographics play a role in the uptake of AI-enabled tools. 62% of Millennials report high levels of expertise using these tools, followed by Gen Z (50%), Gen X (47%), and Baby Boomers (22%).

Among organizational leaders, 47% think their organization is going 'too slow' with implementing AI—even though 69% started investing in AI more than a year ago—with 38% citing resource constraints limiting greater development and adoption...

Previously Published – Executive Briefing, September 9, 2025— openminds.com/market-intelligence/executive-briefings/the-ai-leadership-challenge/

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Ensuring Engagement & Improving Access For Seniors Through The Latest Tech & AI

Facilitator Steve Hornberger, Subject Matter Expert

This presentation took place at The 2025 *OPEN MINDS* Service Excellence Institute during The 2025 *OPEN MINDS* Aging In Place Summit. Attendees heard from Heather Alder, Vice President, Payer Partnerships at Talkspace, Cole Samaroo, MBA, Co-Founder & Chief Executive Officer at Senior Tech Connect and Melisa Hinojosa, Principal Patient Experience, CenterWell Senior Primary Care. They discussed how leading organizations are leveraging technology—from remote monitoring tools to personalized digital and telehealth platforms, to enhance care access, reduce disparities, and drive senior engagement at scale and an understanding of how tech and AI can power the next generation of senior care while ensuring a human-centered experience...

Presented At The 2025 OPEN MINDS Service Excellence Institute – Industry Resource —
openminds.com/market-intelligence/presentation/ensuring-engagement-improving-access-for-seniors-through-the-latest-tech-ai/

View & Listen

The User Matters

By Monica E. Oss, Chief Executive Officer

These days, most executives in most fields are thinking about technology when they are thinking about strategy. “Digital transformation,” defined as the process of using technology to change how an organization operates and delivers value to customers, has remade many industry sectors—retail, banking, and entertainment, to name a few. And that “remake” has created new winners (Amazon, PayPal, Netflix, and Spotify) and caused the premature death of others (Blockbuster, Sears, Kodak, and much of brick-and-mortar retail).

Even the entertainment giant Netflix is in the midst of a technology overhaul (see [Netflix Overhauls Its Home Screen For The First Time In 12 Years](#))...

Previously Published – Executive Briefing, May 20, 2025 — [openminds.com/market-intelligence/executive-briefings/the-user-matters/](#)

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Tech/AI Disruption

Accelerated Digital Transformation Required For Future Sustainability

Digital transformation – the process of using technology to change how an organization operates and delivers value to customers...

- Administrative process/productivity improvements
 - Clinician productivity
 - Supplement clinician services
- Reengineering the clinician experience
- Reimagining the consumer experience
- Measuring consumer outcomes
- More robust analytics for decision support and decision automation – service line portfolio management and management of value-based reimbursement

➤ Solid tech foundation needed – compliance, cybersecurity, data governance, AI policy





Leveraging AI For Short Term Advantage & Long-Term Strategy: A Discussion With Ravi Ganesan, CEO & Founder, Core Solutions

By The Market Intelligence Team

Ravi Ganesan, CEO & Founder, Core Solutions and Monica E. Oss, Chief Executive Officer, *OPEN MINDS* discuss how provider organization executives can leverage technology in general, and AI in particular, to navigate the current challenging market landscape.

Government policy around health care is shifting, workforce resources are shrinking, payer and health plan expectations are changing, and there is increasing competition for consumers and contracts. And provider organizations are constantly under pressure to do more with less – while still delivering a great consumer experience and quality outcomes.

The Essential Strategy Questions Covered In This Interview:

- What are the current tech tools that provider organization execs can deploy to improve performance?
- Can AI help behavioral health and I/DD organizations adapt faster, boost productivity, and improve sustainability?
- Can this be done without the costly burden of replacing their EHR systems?
- And even more importantly – how do executive teams lay out a tech and AI roadmap that leads to long-term success – while improving current performance?

Previously Published – Executive Education On-Demand, June 12, 2025 — openminds.com/market-intelligence/presentation/leveraging-ai-for-short-term-advantage-long-term-strategy/

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(Finally) Planning Your Digital Transformation

By Monica E. Oss, Chief Executive Officer

What's driving digital transformation and the investment in new technology in health and human services? One factor is changing reimbursement—and anticipating performance-based and value-based reimbursement (VBR). According to a recent survey of provider organization executives—[The Tipping Point: The State Of Technology In Value-Based Care](#)—61% think that technology is important to their success with VBR, and 97% plan to invest more in technology for data management.

Almost half (40%) of these same provider

organization executives reported that data quality issues are a top challenge to getting the integrated data they need for performance management...

Previously Published – Executive Briefing, September 15, 2025 — openminds.com/market-intelligence/executive-briefings/finally-planning-your-digital-transformation/

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Developing and Executing a Phased Rollout Plan

Phased Implementation
Rolling out technology in stages helps manage complexity and ensures smooth adoption within clinical environments.

Feedback Integration
Continuous feedback during each phase enables timely adjustments and improvements to the technology solution.

Minimized Disruption
Phased rollout reduces interruptions to clinical operations, maintaining patient care quality throughout the process.

ALEXANDER YOUTH NETWORK

Tech ROI – More Than Numbers

By Monica E. Oss, Chief Executive Officer

What are the key issues in successful electronic health record (EHR) implementation? According to a report, of [25 Years Of Electronic Health Record Implementation Processes](#): compliance, collaboration, competence, and cost.

The more pressing issue for most executive teams is how to best address the challenges endemic in each of these implementation process issues. The study authors identified a number of factors that determine the success or failure of an EHR implementation. At the start, once the decision has been made to acquire

new technology, executives need to develop a detailed implementation project plan and establish their internal cross-functional teams to support the implementation from planning to launch...

Previously Published – Executive Briefing, July 9, 2025 — openminds.com/market-intelligence/executive-briefings/tech-roi-more-than-numbers/

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Assessing Technology ROI

- **ROI Framework:**
 - Revenue maximization
 - Faster billing cycle and fewer delayed claims.
 - Batch billing.
 - Cost Optimization
 - 5% - 10% cost reduction through gains in operational efficiency.
 - Reduced TCO.
 - Quality Improvement
 - Better data > better information > better decision making!
 - Reduced productivity after go live.
 - Improved staff satisfaction and performance, better outcomes.
- **Use NPV and payback valuation with appropriate discount rate to compare options and achieve THRIVING organizational margin goal.**

Tech Integration, From Planning To Practice: The Alexander Youth Network Case Study

By The Market Intelligence Team

This *OPEN MINDS* Executive Roundtable was delivered on August 28, 2025, by Alexander Youth Network (AYN) Chief Information Officer Carolyn Spence. She discussed AYN's process for selecting the technology that best aligns with its clinical and organizational goals and then how it adopts technology using a phased rollout plan, staff training, and feedback loops for continuous improvement.

Executive attendees of this session learned:

- Critical steps and decision points in planning and executing a successful technology strategy
- Common challenges, such as workforce readiness, privacy concerns, and cultural resistance, and practical solutions to overcome them
- Key lessons to support sustainable, consumer-centered digital transformation
- Potential outcomes, including enhanced care coordination, increased client engagement via telehealth, and improved data-driven decision-making

Previously Published – Executive Roundtable, August 29, 2025 — openminds.com/market-intelligence/presentation/tech-integration-from-planning-to-practice-the-alexander-youth-network-case-study/

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Advancing Integrated Care & Service Delivery Through The Use Of Technology: The Cityblock Health & Daymark Recovery Services Case Studies

Facilitator Kim Bond, Executive Vice President

This presentation took place at The 2025 *OPEN MINDS* Strategy & Innovation Institute. Christine Greimann, MSN, RN, CPNP, Vice President, Growth at Cityblock Health and Jerold Greer, Chief Information Officer at Daymark Recovery Services discussed the benefits of advances in integrated health care by enhancing patient outcomes, reducing barriers to care, and promoting continuous integrated care. In addition, they focused on how digital platforms enable real-time monitoring of mental health and data-driven interventions, leading to more efficient accessible treatment.

Presented At The 2025 OPEN MINDS Strategy & Innovation Institute – Industry Resource — openminds.com/market-intelligence/presentation/advancing-integrated-care-service-delivery-through-the-use-of-technology-the-cityblock-health-daymark-recovery-services-case-studies/

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