OLIO INSIGHT PARTNERS

CLIENT PREPARATION GUIDE

Prepare for discovery

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Set aside 15 minutes with the person who prepares the report. Use one business decision to focus the conversation.

- [ ] **Name the decision and its deadline.**

  Who relies on the answer? What would the founder, clinician or board do differently if the number were reliable?

- [ ] **List the reports and their owners.**

  Write down the report names, source systems, locations and refresh dates. Identify who prepares them and who approves access.

- [ ] **Define one measure before comparing totals.**

  Agree on the numerator, denominator, service dates and snapshot age. For payer collections, separate the payer portion from patient responsibility.

- [ ] **Set a practical acceptance test.**

  Choose a reference total, a refresh deadline and the person who signs off. Decide who reviews exceptions and what happens if an update fails.

For the first conversation

Share a business question and source names. Keep patient or staff details, credentials, claim identifiers and confidential reports out of email and the public form. Agree on access and transfer arrangements before sending any files.

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hello@olioinsightpartners.com

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Your meeting worksheet

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Type into the fields or print this page. Keep the worksheet with your team. Use business context only.

Decision, date and decision-maker

What decision is due? Who needs to make it?

Sources and owners

Which reports disagree? Who can explain and authorize each source?

Measure and comparison

What counts, what is excluded, and how old should the records be?

Evidence of success

Which total must reconcile? Who will accept the result?

Launch and ongoing ownership

Who will run the refresh, review exceptions and request future changes?

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