



5 ways to become a data-driven organization



When binders and Excel aren't enough

Disability service agencies have been collecting and using data for a long time, whether that's recording notes in binders to measure individual progress or reviewing data in spreadsheets to measure utilization agency-wide.

Only they're still not able to use all this data to influence client outcomes and improve their business. What's the deal?

As it turns out, staff spend up to 30% of their time searching for the information they need – and come up empty-handed around half of the time.

Even if they do manage to find what they're looking for, 80% of their time ends up spent organizing, cleaning, and preparing the data. Only 20% is spent actually using it. Yikes.

No wonder so many organizations fail to unlock the full potential of data and analytics.

So, why is data so important for organizations that serve people with intellectual and developmental disabilities (IDD)? And what are the steps to becoming a more data-driven organization?

Let's dive right in.

Poorly managed data hurts client outcomes

Today, the field of IDD management — and the healthcare industry as a whole — is moving toward a value-based care model. To get paid, providers must be able to track and show progress against an individual's goals. This emphasis on quality over quantity means that the ability to measure client outcomes will be vital for agencies' continued survival.

While many providers' revenue is still tied to fee-for-service models, the outlook in this area isn't much rosier. Many agencies are struggling to simply organize client records, meet compliance requirements, and get paid for the services they provide. Instead of serving clients, staff are spending their time shuffling documents and entering data into spreadsheets.

Having worked at IDD organizations herself, SETWorks Client Success Manager Jocelyn Bright knows firsthand the frustrations providers face. "Many organizations are still using Excel. For our incident reporting, for example, we would just take the paper documents, put the information into Excel, and turn it into some kind of graph that would get thrown onto our annual plan. And that's what would go to the board. That's what we would show to CARF," she explained.

This is why becoming a data-driven organization is one of the most impactful changes IDD organizations can make.

The benefits of being data-driven include:

- Improved organizational oversight which helps resolve internal issues and improve productivity
- Richer insights leading to improved care and better outcomes
- More accurate predictions leading to optimized performance — for example, higher authorization utilization

Ultimately, being data-driven enables service providers to focus on what matters most: the individuals they serve. By fully leveraging their data, agencies will be able to fulfill their mission of supporting individuals with disabilities and their families.

**A man with a watch
knows what
time it is.**

**A man with two
watches is never
sure.**

MARK TWAIN

Empowering IDD providers with data

When it comes to data, the biggest challenge for IDD providers doesn't stem from a lack of data, but the inability to put that data to use.

"Data-drivenness is about using tools, building abilities, and building a culture that acts based on data," says SETWorks co-founder and co-CEO David Lindell.

To be clear, it's not about replacing human expertise and intuition; rather, it's about fully utilizing data to allow humans to do what they do best.

Lindell gives the analogy of a chess game. Computers can calculate thousands of possible moves at incredible speed, easily defeating the world's most elite human players. But amazingly, having a computer work with a human, where they combine their own respective strengths, is more powerful than most computers.

Likewise, when it comes to making decisions about client care, the human + computer combination is much more powerful than humans or computers alone.

You can spot data-driven organizations by these traits:

- A well-defined data strategy
- A collaborative, open, inquisitive culture
- Integration across departments
- A clear understanding of how to interpret and act on findings
- Effective tools to collect, manage, and use data (including ensuring data quality)

Becoming data-driven

1. Define your data strategy

As with most things, successfully becoming a data-driven organization starts with making a plan. A data strategy is an organization's plan for using data to achieve its strategic goals and business objectives. You'll use your data strategy as a roadmap for how you collect, manage, and use data.

A well-defined data strategy helps you stay focused and make sure you're collecting the right types of data in the right ways to achieve your goals. And, it will help you figure out which changes you need to make to get the most value from your data.

Every organization should have a data strategy. Unfortunately, lots of organizations skip this step. Only 30% of organizations have a well-articulated data strategy. It should come as no surprise, then, that people often find themselves urgently needing to create a report, only to discover they haven't been capturing the necessary data all along!

If you're new to creating a data strategy, Lindell's advice is to work backward. What is your "why"? What are you trying to achieve with data? How does that tie into your organization's overall goals?

From there, you can start thinking about your metrics and key performance indicators (KPIs), the types of data you need to collect, who will be responsible for collecting it, and what systems you will need to have in place.

Of course, your data strategy shouldn't exist only in people's heads. Your data strategy should be a real document that you, or anyone in your organization, can refer back to. You should also:

- create process documents and train staff on them
- make sure there is consistency in what data is tracked, what it is called, and how/when/why it is tracked.
- have a data champion at a high level in the organization to ensure this strategy is followed

2. Build a data-driven culture

There are two types of people in every organization: those that love data, and those that hate it. Not everyone will be on board with the idea of being data-driven right away – and that's OK.

An important step in becoming a data-driven organization is to get buy-in from your team. Says Bright: "In a data-driven organization, everyone understands the importance of data. It's not just something leadership does, or a box to check for compliance. It's part of the culture."

An added benefit: When everyone understands the importance of data (and what data needs to be captured), they're more likely to take ownership of data tracking – resulting in better data completeness and quality.

On the flip side, people who don't understand how their work fits into the big picture might smile and nod during meetings and then go back to what they were doing before.

One way to motivate your team is to make goals and objectives that employees can relate to. Organizations we work with have seen success with scoreboards – which helps employees understand exactly where they are and where they want to be. Looking at these scorecards at daily or weekly meetings and posting them on your wall keeps these goals top-of-mind for your team.

So, which metrics should be tracked in scorecards? It all comes back to the outcomes, metrics, and KPIs you identified in your data strategy. That's why it's so important to have a well-documented strategy in place before you do anything else.

3. Create consistency across departments

One challenge organizations run into when trying to become data-driven is a lack of consistency in their data. Whether it's because different departments use different terminology for the same fields, or because the data is spread out across different systems, data inconsistency can quickly have a negative impact across your organization.

Lindell offered a common scenario: "If you have an individual's record, you might have that record in two different systems for two different departments. And now you don't know which one is correct if the data is different."

Not only does inconsistent data make it hard to effectively track client outcomes, but it can also cause your team to lose confidence in the data.

"When organizations are using paper, they can include or exclude whatever data they want. And then they move to a data management system and they wonder why all this stuff is wrong," explained Bright. "It's wrong because the data entry piece is wrong. If you want the output to be correct, you have to understand the input." Organizations risk confusing, or worse, angering staff if they're unable to provide clean and consistent client data.

So what's the solution? First, make sure departments agree on which data they'll track and how. Your entire team should know what each data field means, how it's measured, and even the right way to input this data into the system.

Next, everyone should be using the same data management system. Good data management systems are built to consolidate everything into one place, which helps ensure quality data that can be trusted and enables useful reporting across an entire organization.

4. Develop data literacy among staff

Another essential piece of becoming a data-driven organization is making sure everyone on your team has the basic skills to work with data — also known as data literacy.

As the name implies, data literacy means being able to read, write, and speak the language of data. Someone who is data-literate is able to understand what the data means and use it to communicate and make decisions.

Like reading and writing, learning to use data is a process. In the early stage, staff begin using data to answer basic questions like “What happened?” or “Where is the problem?”. As they become more proficient, they may use the data in more advanced ways — eventually making predictions and forecasting based on current trends.

Staff who aren't used to working with data in these ways might understandably need extra support. However, even team members who are proficient with data can benefit from additional training. Consider this: Only one out of five global workers report that they are confident in their data literacy skills; one in three say that data literacy training courses would make them more productive.

Of course, a good data management system will make all of this much easier by serving up the data in a way that makes sense to each user.

5. Put the right data management system in place

If you want to become a data-driven organization, you need to have the right tools in place. For many organizations, their data lives in disparate systems or spreadsheets that can't talk to one another or share information. No wonder data is such a headache!

For example, you might have scheduling in one place, timesheets for payroll in another, billing in another, and monthly reporting on client outcomes in yet another. You can't tie relevant pieces of data together, such as a client with an authorization tied to service documentation. Furthermore, the lack of analytics and reporting tools leaves you in the dark as to what's happening within your organization.

If you don't have a solid data management system in place, now might be the time to start looking for one.

Some of the ways to spot a winning system are:

- The software is built for your type of organization — meaning it can deal with the complexities and constantly changing requirements of the IDD industry.
- It has robust workflows and reporting.
- The software includes data validation and other features to make sure you're inputting good data (remember: garbage in, garbage out!).
- It naturally supports integrations across your functional departments (e.g. program departments, billing, and payroll).
- The software provider is responsive, keeps the system up-to-date, and understands your needs.

Your turn!

Today, IDD organizations must be able to deliver exceptional client care, or else they risk going under. It all comes down to measuring and improving care quality – something providers can't do without a solid strategy, clean and consistent data, skilled staff, and a good data management system.

The challenge is that becoming data-driven takes time, patience, and persistence. The good news is that organizations that can overcome these obstacles and learn to embrace (dare we say love) data are able to free up service providers to focus on clients, improve individual outcomes, and multiply their impact – creating a new status quo for service delivery.



About SETWorks

SETWorks is cloud-based software that empowers you to do what you do best - helping others. It is created specifically with IDD agencies in mind so it manages more than just clients - it provides everything that all agencies need in one place.

It is the way to seamlessly integrate all your workflows, streamline your processes, increase compliance and save time.

Our team are IDD experts and passionate about working with and solving agency needs so you are empowered to use SETWorks to focus on what you do best.

Learn more about the SETWorks IDD management system at www.set-works.com or [request a demo](#) today!

Sources

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