

# Reporting That Changes Decisions

*A 5-Minute Operational Assessment for Reporting & Dashboards*

## OBSERVATION FROM THE FIELD

Dashboards get built, distributed, and reviewed every week. Most are accurate. Most are polished. Many still fail the people using them.

A good report doesn't just display numbers. It helps leaders see what is happening, why it's happening, where the risk or opportunity is concentrated, who owns the response, and whether the response is working.

**Before adding another chart or another tab — evaluate the reporting environment itself.**

## The Central Question:

***“Does the reporting help someone make a better decision, faster?”***

## HOW TO USE THIS GUIDE

Review each statement across the five sections below and select the answer that best reflects your current reporting environment. Score based on what leaders can actually see, explain, and act on today — not what the dashboard was designed to do. There are 25 questions for a maximum score of 50 points.

| Response  | Score | What It Means                                                                |
|-----------|-------|------------------------------------------------------------------------------|
| Yes       | 2 pts | This is consistently true and supported by an established process.           |
| Partially | 1 pt  | This happens inconsistently, manually, or only for certain reports or teams. |
| No        | 0 pts | This is not currently available, reliable, or clearly understood.            |

## SECTION 1 OF 5

### Can People Trust the Information?

*Before a report can influence a decision, people must believe it's accurate, complete, and current.*

| Statement                                                 | Yes (2)                  | Partial (1)              | No (0)                   |
|-----------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 1. Users can identify where each major metric comes from. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|                                                                                        |                          |                          |                          |
|----------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 2. Metric definitions are documented and consistently understood across teams.         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. It's clear when data was last refreshed and what reporting period it represents.    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Known data limitations, exclusions, and manual adjustments are visible.             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. When numbers are questioned, the team can trace them back to the underlying source. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Section 1 Score:</b>                                                                | <b>_____ / 10</b>        |                          |                          |

## SECTION 2 OF 5

### Does the Reporting Explain What Is Happening?

*A total or trend may show that something changed — not what changed.*

| Statement                                                                                         | Yes (2)                  | Partial (1)              | No (0)                   |
|---------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 1. Reporting shows performance over time, not just the current result.                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Users can break results down by team, product, location, client, provider, or issue type.      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Reporting distinguishes volume, rate, value, aging, severity, and impact.                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Users can identify where the largest risks, losses, delays, or opportunities are concentrated. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Reporting helps separate isolated issues from recurring or systemic patterns.                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Section 2 Score:</b>                                                                           | <b>_____ / 10</b>        |                          |                          |

## SECTION 3 OF 5

### Does the Reporting Explain Why?

*A dashboard that flags a problem without revealing its drivers creates awareness, not understanding.*

| Statement                                                                                        | Yes (2)                  | Partial (1)              | No (0)                   |
|--------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 1. Reporting identifies the primary drivers behind performance changes.                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Exceptions, failure reasons, and root causes are categorized consistently.                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Users can determine whether an issue stems from people, process, technology, data, or policy. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Reporting distinguishes controllable drivers from factors outside the team's control.         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Assumptions and interpretations are clearly separated from confirmed facts.                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Section 3 Score:

\_\_\_\_\_ / 10

## SECTION 4 OF 5

## Does the Reporting Establish Ownership and Action?

*Visibility without accountability creates observation, not improvement.*

| Statement                                                                                         | Yes (2)                  | Partial (1)              | No (0)                   |
|---------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 1. Each major issue, metric, or improvement action has a clearly identified owner.                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Reporting shows what action is being taken in response to performance.                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Due dates, milestones, or expected resolution timeframes are visible.                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Leaders can identify actions that are overdue, stalled, blocked, or dependent on another team. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. It's clear when an issue requires escalation, a decision, or executive support.                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Section 4 Score:                                                                                  | _____ / 10               |                          |                          |

## SECTION 5 OF 5

## Does the Reporting Change Decisions?

*The purpose of reporting is to improve decisions and results — not fill a meeting agenda.*

| Statement                                                                                        | Yes (2)                  | Partial (1)              | No (0)                   |
|--------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 1. Each major report is connected to a specific decision, action, or management process.         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Users can tell which results require immediate action and which require continued monitoring. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Reporting helps leaders prioritize based on impact, urgency, risk, and effort.                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. The team can determine whether prior actions actually improved the outcome.                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Reports are changed, retired, or redesigned when they no longer support useful decisions.     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Section 5 Score:                                                                                 | _____ / 10               |                          |                          |

## ⚠ RED FLAG INDICATORS

*Regardless of your total score, investigate further if any of the following are present:*

|                          |                                                        |
|--------------------------|--------------------------------------------------------|
| <input type="checkbox"/> | Leaders cannot agree on what the primary metrics mean. |
| <input type="checkbox"/> | Teams maintain separate versions of the truth.         |

|                          |                                                                            |
|--------------------------|----------------------------------------------------------------------------|
| <input type="checkbox"/> | A material performance issue has no named owner.                           |
| <input type="checkbox"/> | Results are consistently reported without underlying drivers.              |
| <input type="checkbox"/> | Issues remain unresolved across multiple reporting cycles.                 |
| <input type="checkbox"/> | Manual workarounds are required to produce routine reporting.              |
| <input type="checkbox"/> | Metrics improve while customer, financial, or operational outcomes worsen. |

## TOTAL ASSESSMENT SCORE

|                                                               |                   |
|---------------------------------------------------------------|-------------------|
| Section 1: Can People Trust the Information?                  | _____ / 10        |
| Section 2: Does the Reporting Explain What Is Happening?      | _____ / 10        |
| Section 3: Does the Reporting Explain Why?                    | _____ / 10        |
| Section 4: Does the Reporting Establish Ownership and Action? | _____ / 10        |
| Section 5: Does the Reporting Change Decisions?               | _____ / 10        |
| <b>TOTAL SCORE</b>                                            | <b>_____ / 50</b> |

## INTERPRETING YOUR RESULTS

|              |                                                                                                                                                                                                                                                            |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>41–50</b> | <b>Decision-Ready Reporting</b><br>Your reporting environment is generally trusted, explainable, actionable, and connected to decision-making. Focus on discipline and simplification rather than adding more data.                                        |
| <b>31–40</b> | <b>Useful but Inconsistent</b><br>Reporting provides meaningful visibility, but some areas still depend on manual interpretation, individual knowledge, or inconsistent follow-through. Strengthen the lowest-scoring section first.                       |
| <b>21–30</b> | <b>Information Without Full Visibility</b><br>Reporting exists, but users may struggle to understand drivers, ownership, priorities, or required actions. The risk isn't a lack of information — it's inconsistent interpretation and slow action.         |
| <b>11–20</b> | <b>High Operational Risk</b><br>Reporting is likely fragmented, reactive, difficult to trust, or disconnected from action. Leaders may be deciding on incomplete data or anecdotal explanations. Prioritize definitions, source validation, and ownership. |
| <b>0–10</b>  | <b>Reporting Blind Spot</b><br>The organization may be producing reports without creating meaningful operational visibility. Immediate work is needed on basic data trust, clear measures, ownership, and a repeatable management process.                 |

## THE FIVE-MINUTE REPORTING TEST

Hand one of your organization's most important dashboards to a leader who did not prepare it. Give them five minutes. Then ask:

1. What is happening?
2. Why is it happening?
3. Where is the greatest risk or opportunity?
4. Who owns the response?
5. What action is underway?
6. What decision is needed?
7. How will we know whether the action worked?

***Every question they can't answer is a visibility gap — in the report, or in the operating process behind it.***

## REFLECTION QUESTIONS

*The score matters less than the conversation it starts. Use these with the right audience:*

### For Operational Leaders

- What do you need to know sooner than you know it today?
- Which issues repeatedly surprise the team?
- Where do averages hide meaningful operational variation?
- What decisions are delayed because the right information is unavailable?

### For Reporting & Analytics Teams

- Which metrics generate the most questions or disagreement?
- Where are manual adjustments or offline calculations still required?
- Which reports require significant effort but produce little action?
- Which requested metrics lack a clear decision purpose?

### For Executive Leadership

- What decision should this report help us make?
- What risk is not visible in the current reporting?
- Do we know what action is being taken and whether it's working?
- What should stop, start, or change based on what we're seeing?

## COMMON IMPROVEMENT OPPORTUNITIES

*Low scores don't just identify risk — they reveal where to start. Below are common opportunities by section.*

|                    |                                                                                                                                                                                                                                                                                                                 |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>01</b><br>Trust | <ul style="list-style-type: none"><li>• Build a metric dictionary that defines every key measure, its source, and its calculation.</li><li>• Establish a single source of truth and retire competing spreadsheets or dashboards.</li><li>• Post a refresh date and known limitations on every report.</li></ul> |
| <b>02</b><br>What  | <ul style="list-style-type: none"><li>• Add trend and segmentation views beneath every headline number.</li><li>• Break out volume, rate, value, aging, and severity instead of one blended total.</li><li>• Flag where risk, loss, or opportunity is concentrated.</li></ul>                                   |
| <b>03</b><br>Why   | <ul style="list-style-type: none"><li>• Standardize root-cause and failure-reason categories instead of free-text “other.”</li><li>• Separate controllable drivers from external factors.</li><li>• Label assumptions distinctly from confirmed facts.</li></ul>                                                |

## 04 Ownership

- Assign a named owner — not a department — to every material issue.
- Add due dates and status (on track, stalled, blocked) to every open item.
- Flag items that need escalation, a decision, or executive support.

## 05 Decisions

- Tie every report to a specific decision or management process it supports.
- Track whether prior actions actually improved outcomes.
- Retire or redesign reports that no longer drive action.

### BEFORE BUILDING ANOTHER DASHBOARD

1. Who will use it?
2. What decision will it support?
3. What action could change based on the result?
4. What information is required to make that decision?
5. How current must the information be?
6. Who owns the response?
7. How will the organization know whether the decision improved the outcome?

***If the answers are unclear, do not build the dashboard yet. A dashboard without a defined decision is usually just a more expensive report.***

### Not Sure Where to Start?

Focus on the section with your lowest score first. Even one or two targeted improvements can dramatically speed up how quickly leaders can see, explain, and act on what's really happening.

## YOUR 30-DAY ACTION PLAN

Use your assessment results to identify your top three priorities. Assign an owner and a target date for each.

| Priority | Action | Owner | Due Date |
|----------|--------|-------|----------|
| 1        |        |       |          |
| 2        |        |       |          |
| 3        |        |       |          |

## KEY OBSERVATIONS

### Biggest Risk Identified

*What represents the greatest operational exposure from this assessment?*

### First Improvement Opportunity

*Where can we create the most visibility and impact in the next 30 days?*

### **Additional Notes**

*Other observations, patterns, or follow-up items from the discussion.*

### **ABOUT IGNITE & ELEVATE**

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We specialize in operational assessments, workflow optimization, governance design, appeals infrastructure, and process transformation — the foundational work that helps organizations operate with clarity, accountability, and confidence.

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***Visibility Precedes Improvement.***