OLIO
INSIGHT PARTNERS

CLIENT PREPARATION GUIDE

Prepare for discovery

Olio Insight Partners LLC / Specialty practice reporting

Set aside 15 minutes with someone who will use the reporting. Use one business decision to focus the conversation.

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

  Who relies on the answer? What would practice leaders, clinicians or the board do differently if the number were reliable?

- [ ] **Identify information and its owners.**

  List current reports, source systems or planned inputs. Note who can explain the figures and approve access. Start with what you know.

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

  Agree on the business definition, period, level of detail and reference total. Record exclusions or adjustments that affect the comparison.

- [ ] **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.

Olio Insight Partners LLC
hello@olioinsightpartners.com

Start with the inquiry form
https://www.olioinsightpartners.com/contact

Your meeting worksheet

Olio Insight Partners LLC / Specialty practice reporting

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

What information is available? Who can explain it and approve access?

Measure and comparison

What counts? Which period and level of detail should the report use?

Evidence of success

Which reference or test confirms readiness? Who accepts the result?

Launch and ongoing ownership

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

Olio Insight Partners LLC
hello@olioinsightpartners.com

Start with the inquiry form
https://www.olioinsightpartners.com/contact