



Instructions for Setting Up a KPI Dashboard in Your Practice

1. Identify Key Metrics for Improvement

Start by choosing the specific metrics you want to track based on your improvement goals.

These could include:

- **Patient Satisfaction**
- **Wait Times**
- **No-Show Rates**
- **Treatment Outcomes**
- **Care Efficiency**

2. Use Simple Tools Like Excel or Google Sheets

If you don't have access to advanced software, you can still create an effective dashboard using basic tools like **Excel** or **Google Sheets**. Both tools are widely available, user-friendly, and versatile for creating simple yet powerful dashboards.

3. Set Up Your Dashboard in Excel or Google Sheets

1. Create a New Spreadsheet

- Label each column with the metric you want to track (e.g., "Patient Satisfaction," "Average Wait Times," "No-Show Rates").
- For each row, enter data for each time period (weekly or monthly data).

2. Add Simple Visualizations

- **Graphs and Charts:** Highlight the data you've entered and insert bar graphs, line charts, or pie charts to visually represent your metrics. For example:
 - Use a **line chart** to track patient satisfaction over time.
 - Use a **bar chart** to compare monthly wait times.

3. Use Conditional Formatting

- Apply **conditional formatting** to highlight trends or problem areas. For example:
 - Set cells with wait times above 30 minutes to turn **red**.
 - Highlight satisfaction scores below 7/10 in **yellow** to easily spot issues.
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4. Use Manual Tracking Methods

If your clinic doesn't use electronic health records (EHR) or other automated systems, you can still track metrics manually:

- **Paper Surveys:** Use paper surveys to gather patient feedback on satisfaction and care quality. Collect and manually input the data into your spreadsheet.
 - **Sign-In Logs:** Track patient wait times by recording when they check in and when they see the doctor. You can use this to manually calculate average wait times each week.
 - **Simple Logs for Outcomes:** For treatment success rates, have staff or DOs manually log outcomes (e.g., pain reduction) after each visit.
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5. Example Setup in Excel/Google Sheets

1. Patient Satisfaction

- Use a column for each month (e.g., "January," "February").

- Create a simple **line chart** showing changes in patient satisfaction scores over time.
 - 2. **Wait Times**
 - Record daily or weekly **average wait times** in minutes.
 - Use a **bar chart** to show wait times each week and monitor improvement.
 - 3. **No-Show Rates**
 - Track how many patients missed their appointments each week.
 - Use a **pie chart** to visualize the percentage of missed appointments vs. attended appointments.
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6. Create a Simple Dashboard Without Special Software

- **Tab for Each Metric:** Use separate tabs for different metrics (e.g., one for patient satisfaction, one for wait times) and set up simple graphs for each.
 - **Summary Tab:** Create a "Summary" tab that consolidates the most important metrics (like patient satisfaction and wait times). Here, you can showcase key trends and goals.
 - **Tracking Progress:** Use conditional formatting (in Excel/Sheets) to visually track progress toward your goals (e.g., green for improving, red for declining).
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7. Instructions for Team Collaboration

If you have a team, you can assign roles for data collection and tracking:

- **Staff Responsibility:** Assign specific team members to gather and input data (e.g., receptionists track wait times, DOs collect treatment outcomes).
 - **Regular Reviews:** Set up monthly or weekly team meetings to review the dashboard together, discussing what's working and where improvements are needed.
 - **Low-Cost Surveys:** Use free or low-cost online survey tools like **Google Forms** to gather patient feedback, which can be easily imported into Google Sheets or Excel.
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8. Use Free Online Tools for Visualization

If you want to go beyond spreadsheets, there are free online tools that allow you to create more professional-looking dashboards without the cost:

- **Google Data Studio:** If your data is stored in Google Sheets, you can easily connect it to **Google Data Studio** to create more polished, shareable dashboards.
 - [Google Data Studio](#)
 - **Canva:** For simpler visualizations, **Canva** offers free chart templates you can customize with your clinic's data.
 - Canva Charts
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9. Paper-Based Alternatives for Small Practices

For very small practices without regular access to computers:

- **Paper-Based Tracking:** Use printed logs to track key metrics like wait times or patient outcomes. Have staff fill them out each day, and review the data in weekly or monthly team meetings.

- **Poster or Whiteboard Dashboards:** You can track progress visually on a whiteboard in the clinic or office. Update the board regularly with patient satisfaction scores, wait times, and other key metrics to keep the team focused on improvement.
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10. Review and Adjust Regularly

Once you've set up your dashboard:

1. **Review It Weekly or Monthly:** Make reviewing the dashboard part of your regular workflow.
2. **Adjust Based on Findings:** If you see an area that needs improvement (e.g., patient satisfaction dips), make adjustments to processes or workflows.
3. **Celebrate Successes:** When goals are met (e.g., reduced wait times), celebrate with your team to encourage continuous improvement.