

## Cutting Through the Noise: Why No One is Using That Report

Many reports launch with excitement. So much time and effort were invested into *perfecting* them. They're shared in a team meeting or an email to create buzz: "Look at this new shiny thing that answers our burning question!" And then, slowly but surely, they fade into the background—used by a few, ignored by most, and rarely updated to reflect new realities.

Typically, the issue isn't bad data or poor design. It's a failure to recognize that reports aren't one-time deliverables. They're stories. And as any good storyteller knows, audiences change over time, and most good stories do, too.

So, what stories are your reports telling? More importantly, is anyone listening?

Here's what I've learned about six key stages of reporting, and how to make the most of each to tell a story that people want to share and revisit.

### 1. Ideation: Purpose Comes First

If you start with the data, you're already behind.

Useful reports begin by defining their purpose. What core business questions are we trying to answer? Who is the intended audience, and what decisions are they trying to make? The goal is not to visualize data for its own sake—it's to enable faster, better decision-making that aligns with strategic objectives, whether that's improving patient access, increasing provider productivity, or identifying inefficiencies in the revenue cycle.

Starting with a metric just because it's available often leads to confusion, misalignment, and missed opportunity. The best dashboards are designed backward: from business need to decision criteria to data.

### 2. Build: Function > Flash

The first version of any report should be simple, clear, and usable. It's a prototype—meant to function, not impress.

Instead of overbuilding, start with what's truly needed. If the goal is to help front desk staff identify patients who need special chart prep today or flag claims that have been sitting too long, a straightforward list is more effective than a slick visualization that's tricky to use.

Don't let perfection get in the way of progress. Maybe the data lives in another system, or you need to adjust workflows to capture it correctly. That's fine. Build around what's available *now*, clearly define what's missing, and create a plan to improve over time. Launch with a small, engaged user group, and iterate from there.

### 3. Socialize: If No One Uses It, It Doesn't Work

This is where most reports fall short.

They may be accurate and well-designed, but if they're not embedded into regular routines, they'll be ignored. Reports need to be part of daily huddles, monthly reviews, and decision-making workflows. Otherwise, they're just noise.

Effective socialization goes beyond one-time training. People need ongoing support, retraining, and reinforcement to actually use a report. And just because a report makes sense to the team who built it doesn't mean it's clear to the people using it.

Questions and feedback should be welcomed, not treated as resistance. They're signs that people are engaging and want to understand. If a report isn't being used, the problem is rarely user indifference—it's a signal that something about the design, delivery, or integration isn't working.

### 4. Evolve: The Only Constant Is Change

Reports don't get to stay frozen in time—at least not if you want them to stay relevant.

A report team's job isn't done at launch. Set up regular check-ins. Proactively ask for feedback. Most users won't request changes unless prompted, and many don't even know who to go to. Something as simple as shifting a date range or adding notes with context can make a big difference—but only if someone knows they can ask for it.

Usage data can offer early signals. Maybe no one's opening that extra tab you spent time building. That's not failure—it's valuable feedback. It could mean that the requirement gathering missed the mark, or maybe users don't understand how that piece fits their work. Reach out and have a real conversation—not just an automated email—to see how you can meet their needs.

As priorities shift, metrics must evolve, too. A report that was perfectly aligned six months ago may not be meeting today's needs due to changing strategies, leadership, or workflows. Staying proactive ensures the report continues to deliver value and adapt alongside your organization.

### 5. Inspire: Reports Should Spark New Ideas

A good report doesn't just track performance. It reveals opportunity.

Reports should be built to solve real problems, but *their value multiplies* when they help uncover new ones. With the right training and visibility, users will notice patterns, ask better questions, and surface insights that weren't on leadership's radar.

A team that regularly reviews their no-show rate and notices it spikes on certain days or at specific times may start a new line of inquiry—and potentially a new report that helps all practices spot the same trend. One discovery sparks the next.

The key is to create space for curiosity. As reports become part of regular conversations, they stop being passive tools and start becoming active drivers of innovation. If your reports aren't sparking new ideas, they're underperforming.

## **6. Conclude: Know When to Wrap It Up**

Not every report is built to last—and none of them should remain unchanged forever.

As BI tools have grown more powerful, many organizations have ended up with hundreds, if not thousands, of reports (we wish we were kidding...). The problem? A large portion of them go unused. They're still maintained and processed, but they're no longer helping anyone make decisions.

It's important to regularly audit your reports. Retire what's irrelevant, consolidate where you can, and reinvest in tools that reflect current priorities. This isn't just about cutting down—it's also about evolving. Retiring outdated reports should create room (and capacity) to build new ones that reflect where the organization is headed, not just where it's been.

Similarly, don't overwhelm users with too many "active" reports. If someone gets 10 or 15 reports pushed to them every day, they're going to tune out—or worse, drop the wrong one. Reducing that cognitive load isn't just a matter of preference. It's a strategic imperative.

Simplification helps teams focus on what matters most. That might mean sunseting an old report, pausing distribution, or combining several views into a single, streamlined version. No matter how helpful a report once was, if it's not driving clarity today, it's probably time to let it go.

## **Reports Need Lifelong Care**

At the end of the day, reports aren't just for measuring—they're for *moving*. They should drive decisions, surface blind spots, and ultimately improve performance.

But none of that happens if you treat a report like a ticket to be closed. It's a story, and good stories adapt to communicate the theme in an ever-changing context.

So, now you're at a reflection point: where are your reports in their life cycle? Are they doing what they were built to do—or are they stale and irrelevant?

Need a few ideas to help clean up your storytelling? We're here to help.