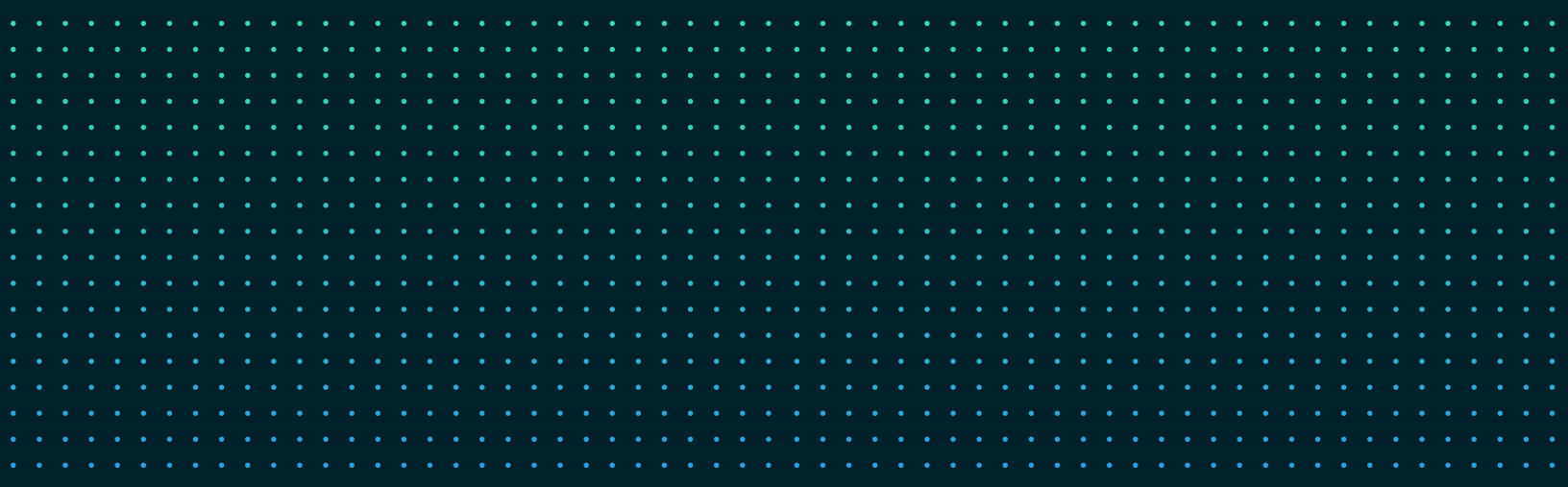


CFO's Guide to Board Presentations on Revenue Cycle



01 Introduction

For CFOs and revenue cycle leaders at healthcare organizations, the board presentation is a pivotal moment. It's your opportunity to convey not only how the RCM operation is performing but also how it is evolving in response to market pressures, payer behavior, staffing realities, and emerging technologies.

An effective board presentation goes beyond reports. It aligns revenue performance with strategic imperatives like growth, patient access, and operational efficiency. This guide offers a framework to help you craft data-informed, executive-level RCM narratives that build credibility—and help unlock the resources you need.

02 What the Board Wants to Know

Board members are not looking for billing mechanics. They want to understand how RCM is enabling (or impairing) the organization's strategic goals.

Their top questions typically include:

- Are we collecting efficiently and completely?
- Are there risks to cash flow in the next 1–2 quarters?
- How are payers affecting our revenue integrity?
- What steps are being taken to reduce denials, patient A/R, and write-offs?
- How does our performance compare to similar organizations?
- Are we overstaffed—or underinvesting in automation?
- What do we need to fund or approve to improve performance?

03 Structuring the RCM Story

Your board deck should follow a consistent structure that connects KPIs to strategy. We recommend organizing your narrative into four sections:

1. Performance Snapshot

- How are we trending on core metrics? What changed this quarter?

2. Operational Drivers

- What factors (e.g., staff, agents, vendors, payers) are contributing to success or underperformance?

3. Strategic Initiatives

- What new workflows, tech platforms, or partners are being adopted?

4. Risks and Requests

- Where are the vulnerabilities and what leadership actions are needed (e.g., capital, hiring, IT support)?

04 Key Metrics to Include

Include a concise dashboard with trend graphs, benchmarks, and targets. Focus on these core categories:

Cash Flow & Performance

- Days in A/R
- Net Collection Rate
- Bad Debt + Charity Write-offs

Operational Efficiency

- First-pass clean claim rate
- Denial rate + overturn rate
- Cost to collect (% of revenue)

Staffing & Scalability

- FTEs per \$1M in net revenue
- Claims processed per team member
- Agent-assisted transactions vs. human-only

05

Dos and Don'ts

Do:

- Highlight trend direction, not just point-in-time data
- Frame wins and gaps in business language (e.g., ROI, growth impact)
- Show how automation and AI are improving outcomes
- Tell a story connecting the data shared.
- Own what's not working—and what you're doing about it

Don't:

- Overload slides with process minutiae or bring more slides than minutes allocated to present
- Blame payers or staff without a clear improvement plan
- Assume the board is familiar with RCM acronyms or cycles
- Miss the opportunity to request investment when needed

06

How to Leverage AI Agents in Presentations

If your organization is piloting or scaling AI agents, highlight how they:

- Reduce manual workload on high-volume tasks (e.g., payment posting, insurance verification)
- Improve consistency and speed
- Free up staff for strategic functions (e.g., denial resolution, payer negotiation)

Use visuals like before/after staffing or cash impact charts to show agent ROI. Clarify that agents are supervised and integrated—not replacing your entire team.

07

Communicating Risks and Investments

Be transparent about vulnerabilities, especially if they relate to payer delays, denials, or outdated tools. Use the board presentation to:

- Flag risk proactively (e.g., payer backlog, underperforming BPO)
- Make the case for strategic investment (e.g., AI agent expansion, platform consolidation)
- Show what ROI you expect and how you'll track it

Framing RCM as a growth enabler—not just a cost center—helps justify forward-looking investment.

Appendix A: Sample RCM Board Presentation Agendas

Sample Agenda 1: Standard Quarterly RCM Update

- **5 min:** Executive summary (RCM highlights)
- **7 min:** Performance metrics & trends
- **5 min:** Staff/vendor/agent productivity snapshot
- **5 min:** Denials, aging A/R, and write-offs
- **3 min:** In-flight initiatives (e.g., automation rollout)
- **5 min:** Risk & mitigation update
- Q&A

Sample Agenda 2: AI & Automation Impact Review

Purpose: Demonstrate the financial and operational impact of AI agents and automation initiatives in RCM.

- **3 min:** Brief overview of automation strategy and goals
- **5 min:** Before/after comparisons: staffing, cash acceleration, cost to collect
- **5 min:** Agent performance: volume handled, exceptions routed, error rate
- **5 min:** Staff redeployment and training outcomes
- **5 min:** Next phase of agent rollout or upgrades
- **2 min:** Investment asks (if any)
- **5 min:** Q&A

Agenda 3: Denials, Write-Offs & Revenue Integrity

Purpose: Educate the board on systemic issues with payer denials and what's being done about them.

- **3 min** Denial rate trends over past 4 quarters (clean claims vs. final denials)
- **5 min** Top denial reasons and payer sources
- **5 min** Underpayment and timely filing write-offs: trends + impact
- **5 min** Interventions (agent adoption, coding QA, payer escalations)
- **2 min** Organizational risk and compliance exposure
- **5 min** Board support needed (e.g., payer negotiation, compliance resources)
- **5 min** Q&A

Agenda 4: RCM Readiness for Growth & Expansion

Purpose: Align RCM capacity and scalability with the company's expansion roadmap (e.g., adding sites, M&A, launching new service lines).

- **3 min** Growth roadmap: new sites/services added or pending
- **5 min** RCM capacity assessment: staff, tech, processes
- **5 min** Systems readiness (PM/EHR integration, agent scale-up, training)
- **5 min** Potential bottlenecks: payer enrollment, workflows, platform gaps
- **3 min** Readiness scorecard across key metrics
- **4 min** Action plan + budget required for scalability
- **5 min** Q&A

[Set up a conversation with us on framing RCM's strategic role to the Board.](#)