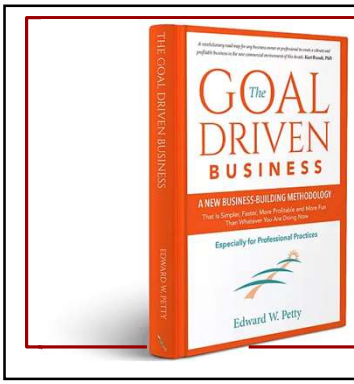
Trick
Or
Treat!

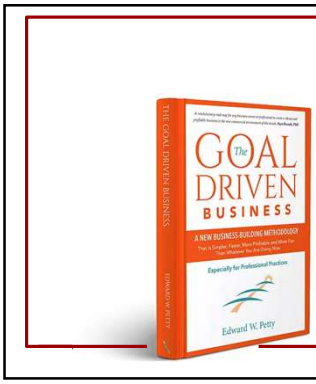
1



Section II

IMPROVE and STRENGTHEN

2



Section II

IMPROVE and STRENGTHEN
- Class 5 -

GOAL:
1. Learn why and how to use the LAB.

2. Learn why and how to use the practice improvement process called G.A.P (Kaizen).

3

Class 5

1. Section II Introduction
2. Why the SHIFT to The New Model of Management
3. The Lab
4. Improvement Process
   - Kaizen/G.A.P
   - Team Meetings
   - Team Training

4

Section II

	2. IMPROVE and STRENGTHEN
Oct. 14 Wk. 5	1. **INTRODUCTION TO SECTION 2** 2. **Improvement Process and the Lab.** If you are not constantly improving, your patients will go to a clinic that is. This lesson will teach you how to use a process of constant improvement, referred to as Kaizen (Japanese: Improvement.) This is where you learn how to work ON the business, not just in it. 3. **Team Improvement:** Learn group procedures such as team training, coaching, and planning that motivate and improve your team's performance as a team.
Oct 21 Wk. 6	1. **Goal Driven Procedures and Policies**. You will review and receive sample customizable templates, including job and dept. checklists, workflow pathways, policies, and an employee manual, and learn how to make your own. 2. **Individual Improvement.** Employees want to improve, and you will learn the methods and tools to improve individual performance through hiring, training, coaching, and organizing. 3. **Managing and Improving Different Departments and Roles -1.** Front Desk, Billing (Patient Accounts), Therapy.
Oct 28 Wk. 7	1. **Managing and Improving Different Departments and Roles -2.** Doctors, your Clinic Director (!), outside services. 2. **Marketing Manager System** - This system has worked for over 20 years to grow practices and take them out of the ups and downs of the practice roller coaster. You will learn how to create an effective marketing department.
Nov 4 Week 8	1. **CEO/Manager Part 2**: This section is a more advanced study of the roles of the CEO and the Manager. Learn more about the *Fast Flow CEO System*, *Service* Leadership and Management, how the manager "clears the CEO's desk," project management, and how to work as a team to improve performance in each clinic dept. 2. **Finance.** We briefly touch upon the basics: budgets, requisition proposals, overhead, expenses, return on investment. 3. **Leadership- Part 2** For the Clinic Director.

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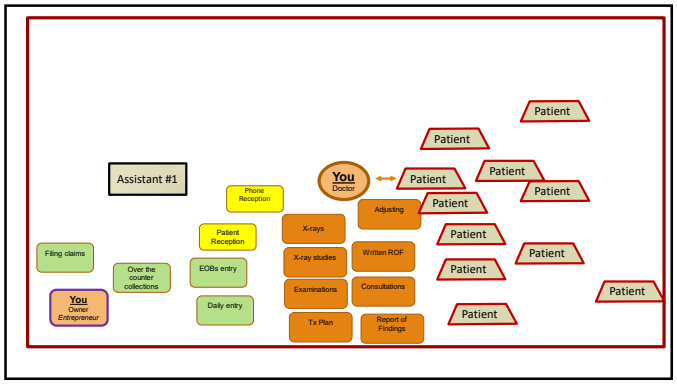

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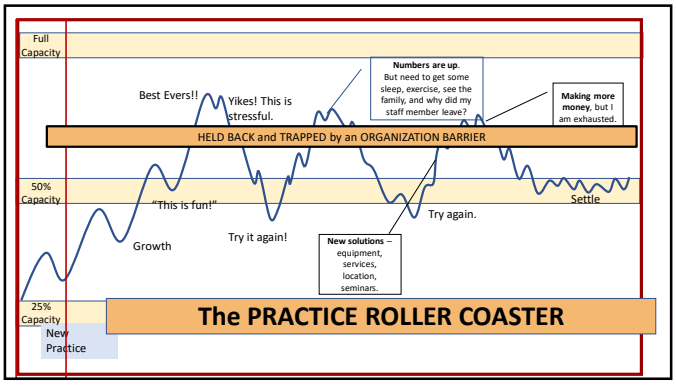

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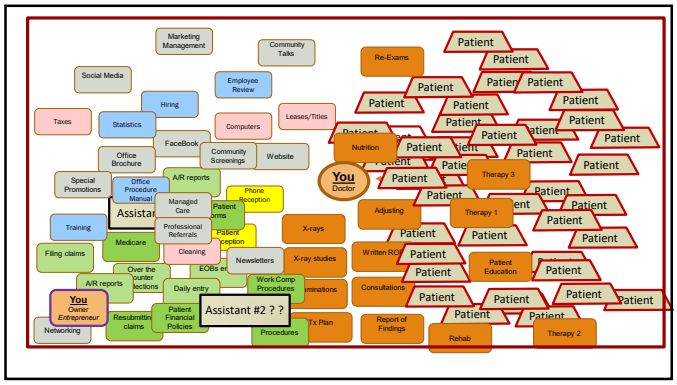

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Class 5

Great! We know where we want to go.
We have goals, stats, but how do we get there?
How do we get to our Goals?

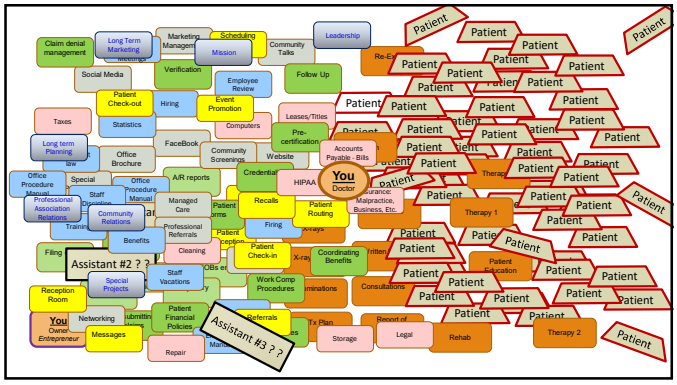
Personality Driven Practice

Dependent on Provider

Roller Coaster
Stunted achievement
Extra Stress
Less profit
Less fun!

Hidden barriers

11



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Industrial Age

Working on the line.
Just a J.O.B.

12

Pineapple Cannery,
Libby, McNeil, Libby, Honolulu

13

Class 5

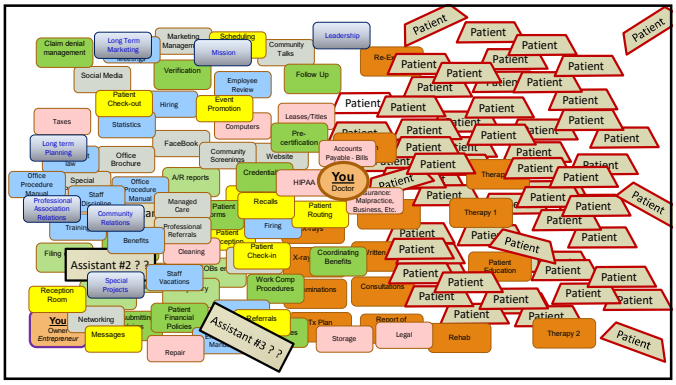
Ma and Pa
Entrepreneurial Mindset.
Stuck in their pioneering ways.
Maybe good at cookin', but not managing'.

It's my office and I'll do what I want…!

14

Hero complex.
Highly trained professional
but no one else is so I have to do it all.
It's all me with some assistants.

15



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The 3 Goals of Care

	PATIENT
GOAL 3	Wellness
GOAL 2	Correction
GOAL 1	Relief

3 GOALS

BIG SHIFT for the patient, a paradigm shift from symptomatic care to wellness care

17

The 3 Phases of Care

	PATIENT	BUSINESS
GOAL 3	Wellness	Greater purposes of the business and its people – happy owner and staff, contributions outside of business to community
GOAL 2	Correction	A well structured, strong business with systems and people in alignment with common goals.
GOAL 1	Relief	Profit from Production from Marketing (Business Cycle)

BIG SHIFT for the business owner and team, a paradigm shift from symptomatic business management to strengthening and improvement and goal management.

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The 3 Phases of Care

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BIG SHIFT for the business owner and team, a paradigm shift from symptomatic business management to strengthening and improvement and goal management.

19

It's the Manager

- While the world's workplace has been going through extraordinary historic change, the practice of management has been ***stuck in time*** for ***more than*** 30 years.
- The solution lies in aligning the practice of management with the new *will* of the world's workers. The great American dream is changed….What the whole world wants is a good job. This is the new will of the world. Everything will change when an organization's respond to that will.
- Currently, just 15% of employees worldwide are engaged at work.
- A great job is one in which the employee is "developing with rich mission and purpose."
- The *science* of management has advanced significantly in the fast 3 decades but the *practice* of management hasn't.
- Peter Drucker wrote: "There is only one valid definition of business purpose: to create a customer." The new purpose of business and the future of work has to include ***maximizing human potential.***
- A great job has all the qualities of a good job. But with one big difference. **Employees are engaged in meaningful and fulfilling work and feel they are experiencing real individual growth and development in the workplace.**

20

It's the Manager

"Of all the codes Gallup has been asked to crack dating back 80 years to our founder, George Gallup, the single most profound, distinct, and clarifying finding -- ever -- is probably this one: 70% of the variance in team engagement is determined to solely by the manager.

"When you have great managers who can maximize the potential of every team member, you have delivered on the new global will: a great job and a great life.

"This is the future of work."

21

The Shift

Changing Demands of the Workforce

Past →	Future
My Paycheck	My Purpose
My Satisfaction	My Development
My Boss	My Coach
My Annual Review	My Ongoing Conversations
My Weaknesses	My Strengths
My Job	My Life

22

Class 5

We make the BIG SHIFT by moving the practice through stages by making little BIG SHIFTS

Personality Driven Practice

Dependent on Provider

Stage 1 → Stage 2 → Stage 3 → Stage 4.1 → Stage 4.2 → Stage 4.3 → Stage 5

Smaller BIG SHIFTS climbing stages. →

Goal Driven Business

Dependent on Goals

BIG SHIFT

23

The 3 Goals

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Big Shift for the patient to go from the mindset of pain relief to Correction and Wellness.

It is a Big Shift to go from an entrepreneurial practice to a strong business with higher goals

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Smaller BIG SHIFTS → Pushing the practice upward to its goals – a Goal Driven, Team Managed, Systematized Business

→ **20 Shifts to a Goal Driven Practice** →

From the old to the new

STAGE	OLD MODEL OF PRACTICE MANAGEMENT Personality/Provider Driven Practice	Goals Lab	→	GOAL DRIVEN MODEL OF PRACTICE MANAGEMENT Goal Driven Business	Progress Percent Applied 25-50-75-100%
1.	Not having a designated place and time to continually work ON the business.		1.	**Goals Lab** – A scheduled location to continually work on improvement.	
	Stimulus-motivated management.		2.	**Map and manual** on how to build, operate and navigate steadfast to your goals.	
	Provider not marketing.		3.	**Evangelist** for your services.	
	General and indirect marketing, weak or no marketing. Wrong markets, wrong offers;		4.	**Direct marketing**. Specific USP. Solving problems for specific markets. Correctly targeted offers.	
2.	Trying to manage or lead in role of provider or owner.		5.	**Leading and managing** as CEO and Chief Coach for your business.	
	Employees not trained to be team members.		6.	**Goal Driven Team Members.**	
	No manager managing for improvement or business development.		7.	**Goal Driven Manager.**	
	No one in charge of marketing systems.		8.	**Goal Driven Marketing Coordinator.**	
	Greater goals and tangible goals not defined, embraced, and followed.		9.	**New Goals** defined, embraced, and pursued.	
	Pathways unclear, constraints undetected.		10.	**New Service Flows** defined, kept open, fast and friendly. Logjams detected and removed.	
	No systematized marketing dept.		11.	**Systematized Marketing** including all team members marketing.	
3.	Employees not expected or helped to become experts.		12.	Employees trained to become professional experts.	
	Job descriptions with no goals, outdated or complicated procedures, impractical to use.		13.	**Goal Driven Procedures.**	
	No continuous improvement of team members and procedures.		14.	Continuous improvement of team members and procedures.	
4.	Wasteful actions when business is doing well. Poor discipline.		15.	**Lean management** and professional discipline applied, getting "more for less."	
	Minimum outcomes and moderate satisfaction from customers.		16.	**Standards raised** to world-class service and complete outcomes with extra-ordinary satisfaction from customers.	
	Personal improvement and integrity are low priority.		17.	**Personal values** and personal improvement encouraged for all team members and owners.	
5.	Not retaining and using what worked, not teaching it, and not helping others.		18.	**Total Team Leadership**. Teaching is leading.	
	Greater goals and personal goals kept separate from business goals.		19.	**Greater Goals Integrated**. Personal, professional, and practice goals aligned and supported.	
	Bored, no new endeavors and not moving to the next level.		20.	Your **NEXT** era of business development planned and begun.	
	NEXT LEVEL (Go through Stages 2 – 5 at a higher level.)				

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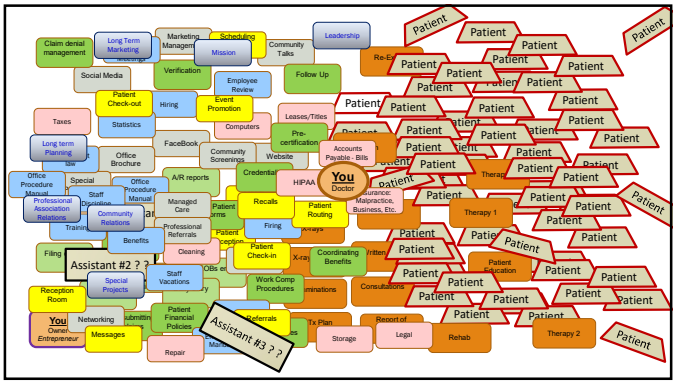

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THE GOAL DRIVEN MANAGER

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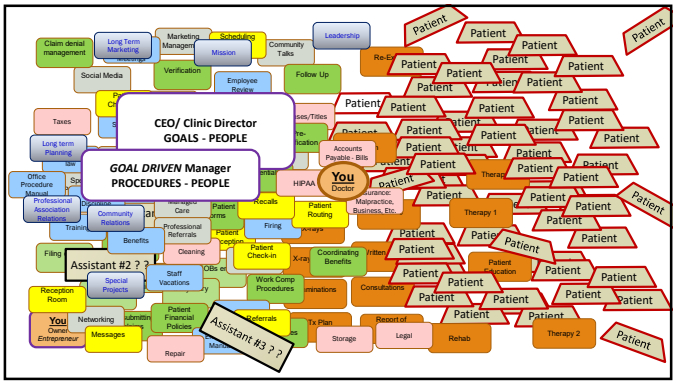

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Big Shift are Not Easy
People don't accept change easily.

Shifts are often uncomfortable.
They will require discipline, effort, and repetition.
And extreme ownership.

Office Manager as a supervisor, clerk, Girl Friday

THE GOAL DRIVEN MANAGER

GOAL DRIVEN MANAGER as an expert coach who takes extreme responsibility and ownership for the practice, and through their efforts, helps others achieve the goals of the business.

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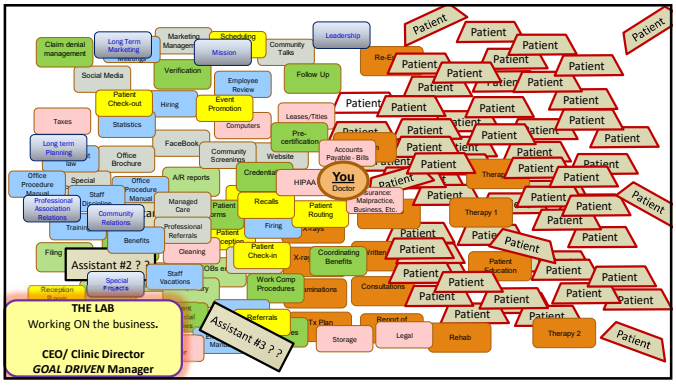

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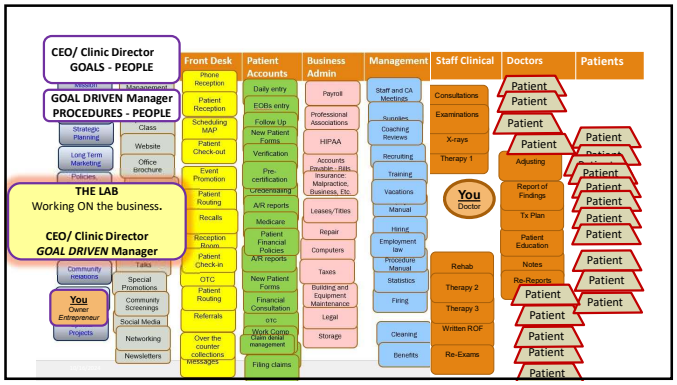
CEO/ Clinic Director
GOALS - PEOPLE
GOAL DRIVEN Manager
PROCEDURES - PEOPLE
THE LAB
Working ON the business.
CEO/ Clinic Director
GOAL DRIVEN Manager
Strategic Planning
Long Term Marketing
Policies
Class
Website
Office Brochure
Community relations
Talks
Special Promotions
You
Owner
Entrepreneur
Community Screenings
Social Media
Projects
Networking
Newsletters
Front Desk
Phone Reception
Patient Reception
Scheduling MAP
Patient Check-out
Event Promotion
Patient Routing
Recalls
Reception Room
Patient Check-in
OTC
Patient Routing
Referrals
Over the counter collections
Messages
Patient Accounts
Daily entry
EOBs entry
Follow Up
New Patient Forms
Verification
Pre-certification
Credentialing
A/R reports
Medicare
Patient Financial Policies
A/R reports
New Patient Forms
Financial Consultation
OTC
Work Comp
Claim denial management
Filing claims
Business Admin
Payroll
Professional Associations
HIPAA
Accounts Payable - Bills, Insurance: Malpractice, Business, Etc.
Leases/Titles
Repair
Computers
Taxes
Building and Equipment Maintenance
Legal
Storage
Management
Staff and CA Meetings
Supplies
Coaching Reviews
Recruiting
Training
Vacations
Manual
Hiring
Employment law
Procedure Manual
Statistics
Firing
Cleaning
Benefits
Staff Clinical
Consultations
Examinations
X-rays
Therapy 1
You
Doctor
Rehab
Therapy 2
Therapy 3
Written ROF
Re-Exams
Doctors
Adjusting
Report of Findings
Tx Plan
Patient Education
Notes
Re-Reports
Patients
Patient

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