

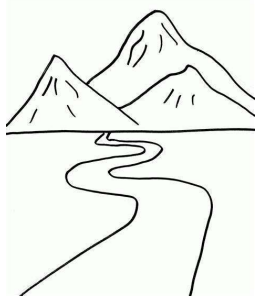
Class 4.

Lesson 2
Goal Driven Analytics
Gauging your progress to your goals.

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GOALS

Know where you are headed,
where you need to go.



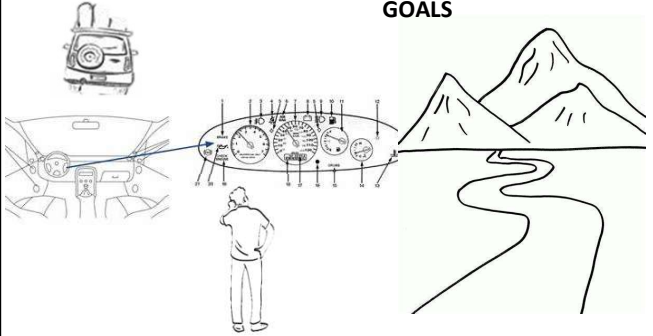
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GOALS




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GOALS




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Analytics
Key Performance Indicators

1. Reason to use numbers. Objective navigation.
2. Collecting and displaying the statistics
3. Reading the numbers to improve performance


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Analytics
1. Reasons to use numbers.
Avoiding odd management styles.

- Management by emotion.
- Management by bright idea!
- Management by hearsay or gossip.
- Management by personal bank account.
- Management by CPA.

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Analytics
Reason to use numbers.



They are objective.

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Statistics allow everyone to face the brutal facts. Jim Collins

The moment a leader allows himself to become the primary reality people worry about, rather than *reality being the primary reality*, you have a recipe for mediocrity, or worse.

Yes, leadership is about vision. But leadership is equally about creating a climate where the truth is heard and the brutal facts confronted.

Good to Great. Jim Collins

Greater Goals – Vision
↕
Practical Goals - Outcomes

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In a Goal Driven practice, you work for the goals.

Statistics show how well you are doing as a team and individually.

They are your real “boss.”

Fair and honest.

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In a Personality Practice, you work for the “boss.”

Keeping the boss happy, avoiding disapproval, looking the part.




In a Goal Driven Business, you work for the goals.

Statistics show how well you are doing as a team and individually. They are your real “boss.” Fair and honest.



BIG SHIFT


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2. Collecting and displaying the statistics

- Computer
- Daily forms – spreadsheet
- Daily forms - manual

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Class 3, Lesson 2 Analytics

Key numbers:

- New Patients
- Visits
- Charges (Services)
- Collections

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Chiropractic - Monthly Scorecard Report

n 2

Report for the month of _____ Name of person filing report: _____

Please Answer the Following Questions:

1. Any new office procedures? Please comment below. Yes No
2. Any new marketing or promotional? Please check and comment below. Yes No
3. Any new personnel changes? Please comment below. Yes No

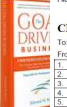
COMMENTS: (written in black font and blue font)

Dr.	New Patients	Adm. Serv.	Services	Adj. Services	Collections	Days Pending
Dr. _____						
TOTAL						

NEW PATIENT TRACKER

Source of New Patients	Dr. #1	Dr. #2	Types of NP's	Dr. #1	Dr. #2
1. Patient Referral			Group Insurance		
2. Staff Doctor Referral			Workers Comp.		
3. Staff Referral			Personal Injury		
4. Reactivated Patient (only and how counted as a)			Cash		
5. Yellow Pages			Medicare		
6. Sign/Location			PPO		
7. Professional Referral, attorney			HMO (Fee For Service)		
8. Professional Ref. (other: MD, DDS, etc.)			HMO (Cap.)		
9. Industrial/Business Referral			BC/BS		
10. Outside Screening			Other		
11. Outside Lecture			Other		
12. Outside Mailing			Other		
13. Advertising, TV, Radio, Print, Other					
14. HMO/PPO Steerage					
15. Special Promo, What? 1.					
16. Other: What? 2.					
TOTAL NEW PATIENTS:					

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PRACTICE SCORECARD

Week / Month Ending: _____

CLINIC:	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Week	MTD
1. Scheduled Appointments									
2. Missed Appointments									
3. Keep Appointments									
4. Keep App. % (3 + 1)									
5. Drop in Calls									
6. TOTAL DR'S (5 + 3)									
7. Dr. #1									
8. Dr. #2									
9. NEW PATIENTS-Referrals									
10. Dr. #1									
11. Dr. #2									
12. TOTAL SERVICES									
13. Dr. #1									
14. Dr. #2									
15. Scheduled Out									
16. TOTAL ADJ. SRVS									
17. OTC									
18. TOTAL COLLECTIONS									
19. Dr. #1									
20. Dr. #2									
21. CCR % (see the 50/50 Ms. Gal)									
22. ACCOUNTS RECEIVABLE									
23. Post Reports (R2's & R2's)									
24. # Health Class Scheduled									
25. # Health Class Attended									
26. # Reactivation Post Cards									
27. # RFP Placards									
28. # RFP events									
29. # RFP Reports (R2's)									
30. X-rays									

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New Patient Log And Checklist

Month: _____ Year: _____ Team member responsible for completing log: _____

Date	Patient Name	Amount of Findings (1-5 Programs)	Multi-Referrals (Check for "Yes")	Fin. Control (Check for "Yes")	FIN. ADJ. (Check for "Yes")	ADJ. (Check for "Yes")	Referred by patient, which is the name?	Type	Notes
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									

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New Patient Tracker Analytics

Source of New Patients	WTD	MTD	Types of NP's	WTD	MTD
Patient Referral			Group Insurance		
Staff Doctor Referral			Workers Comp.		
Staff Referral			Personal Injury		
Reactivated Patient (only and how counted as a)			Cash		
Total Internal:			Medicare		
Yellow Pages			PPO		
Sign/Location			HMO (Fee For Service)		
Professional Referral, attorney			HMO (Cap.)		
Professional Ref. (other: MD, DDS, etc.)			BC/BS		
Industrial/Business Referral			Other		
Outside Screening			Other		
Outside Lecture			Other		
Outside Mailing					
Advertising, TV, Radio, Print, Other					
HMO/PPO Steerage					
Special Promo, What? 1.					
Other: What? 2.					
TOTAL NEW PATIENTS:					

NOTE: 1) Special Promotions include one time events, such as a "Kid's Day", "Patient Appreciation Week", etc. Keep track of NP's generated from these promotions but do not count them in the total as they will also be counted from other categories, such as "Patient Referral", "Radio", etc. 2) Some new patients may come in from two or three sources.

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Class 4 Analytics

Displaying the numbers

- Charts
- Graphs

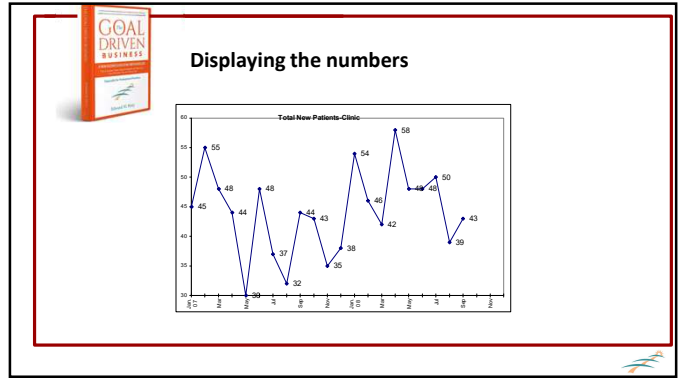
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YEAR-08	NPS	OV's	% Services	Total Adj Svc	Total Collection	TSB% Col'd	Adj B% Col'd	Blam OVP	Total Biv/OV	Total Biv/NP	Col'd TSDV	Wkld	Visits per day	NOTES
Jan-08	54	475	\$79,824	\$59,081	\$59,832	96%	127%	8.8	\$168	\$1,478	\$108			
Feb	46	451	\$63,028	\$44,184	\$43,089	94%	73%	9.8	\$140	\$1,370	\$96			
Mar	42	482	\$70,792	\$39,736	\$46,007	71%	102%	11.0	\$153	\$1,886	\$87	17.0	27	
Apr	58	615	\$95,110	\$78,609	\$46,204	65%	150%	10.6	\$145	\$1,536	\$75	17.0	36	
May	48	592	\$90,136	\$61,228	\$42,533	48%	54%	12.3	\$152	\$1,978	\$72	17.5	33	
Jun	48	638	\$95,636	\$57,700	\$48,700	55%	81%	13.3	\$134	\$1,384	\$78	17	38	
Jul	50	622	\$103,091	\$69,973	\$50,511	59%	89%	12.4	\$166	\$2,082	\$81	17	37	
Aug	39	527	\$89,013	\$16,494	\$58,866	57%	84%	13.5	\$169	\$2,282	\$112	16	33	
Sep	43	440	\$93,147	\$70,514	\$51,620	58%	113%	10.2	\$212	\$2,166	\$117	12	37	
Oct														
Nov														
Dec														
Total:	428	4822	\$763,778	\$487,840	\$447,162	59%	92%	11.3	\$158.4	\$1,785	\$93	113.3		

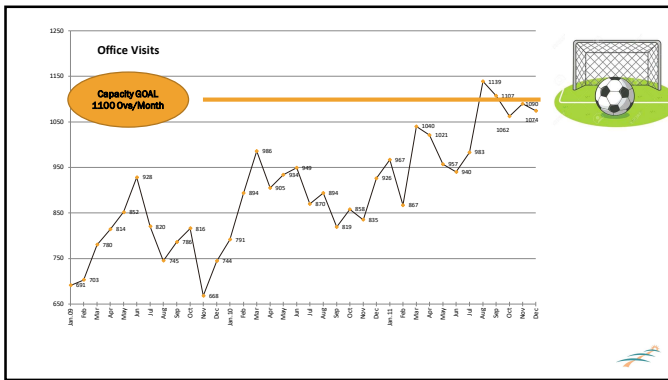
YTD	NPS	OV's	Total Services	Total Adj Svc	Total Collection	TSB% Col'd	Adj B% Col'd	Blam OVP	Total Biv/OV	Total Biv/NP	Col'd TSDV	Wkld	Days
YTD	428	4822	\$763,778	\$487,840	\$447,162	59%	92%	11.3	\$158	\$1,785	\$93		
LYTD	383	4746	\$786,284	\$508,680	\$557,331	71%	85%	12.4	\$184	\$2,037	\$117		
DIFF	45	96	-\$162,507	-\$120,841	-\$110,169	-13%	7%	-1	-\$60	-\$253	-\$24		
%CHGE	12%	2%	-2%	-26%	-20%	-18%	9%	-9%	-4%	-12%	-21%		

Observations and Recommendations

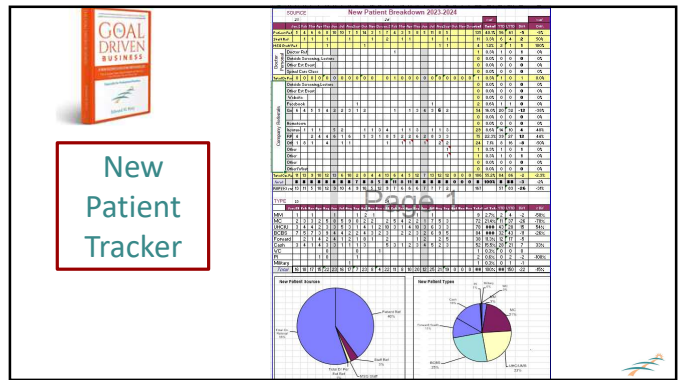
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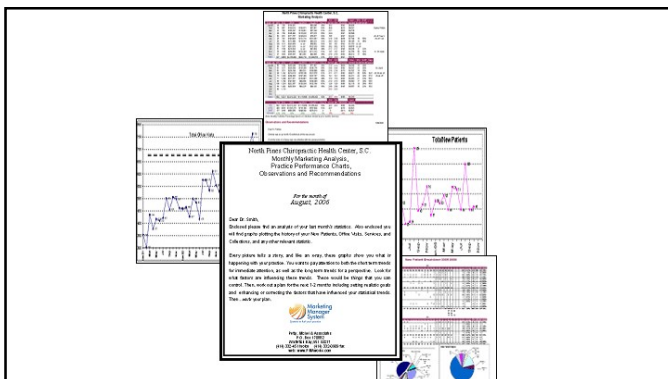
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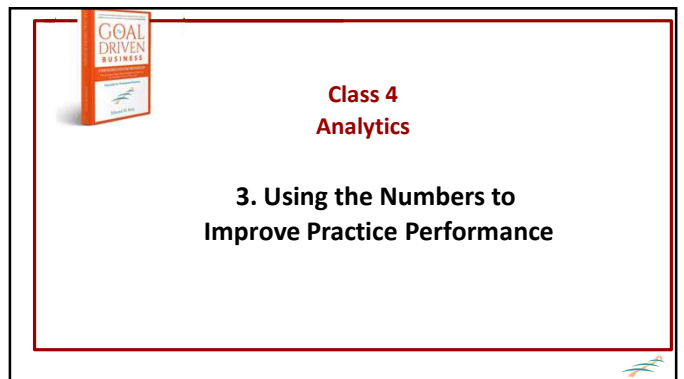
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Numbers by themselves mean nothing.


They must be compared...
to a goal or standard: how close to the goal.
to a time period: example - last month ↓ ↑



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GOALS

Reading the dashboard.







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1 Month – Light improvement planning. GAP/KAIZEN

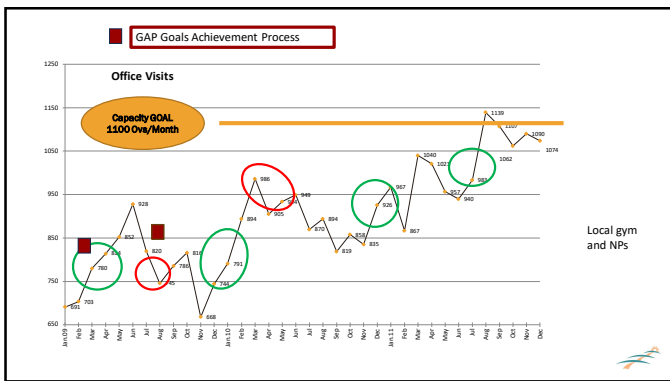
1.		1. Up sharply	Find out – support.
2.		2. Up slightly	Do nothing.
3.		3. Down slightly	Watch
4.		4. Down steeply	Find out -- fix

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3+ Month – Major improvement planning. GAP/KAIZEN

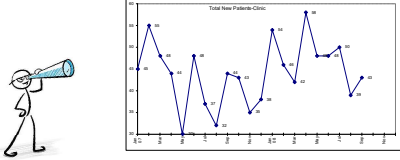
1.		1. Up sharply	Find out – support.
2.		2. Up slightly	Do nothing.
3.		3. Down slightly	Watch
4.		4. Down steeply	Find out -- fix

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GOALS




Reasons why numbers worsen:

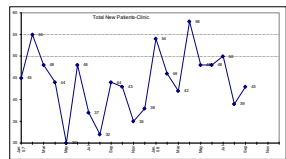
- *Thanksgiving holiday.
- *Christmas holiday.
- *January deductibles.
- *March/April spring break
- Sporting events
- School vacations
- Etc.

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GOALS



1. "The future depends on what you do today." - Mahatma Gandhi
 2. "Your life does not get better by chance, it gets better by change." - Jim Rohn
 3. "You are not the product of your circumstances, but the product of your decisions." - Stephen Covey



"When a team takes ownership of its problems, the problem gets solved. It is true on the battlefield, it is true in business, and it is true in life." - Jocko Willink



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Scale of Responsibility

		Values class
5. Full Responsibility	Extreme ownership.	
4. Mildly Contributing	Take care of their own and help the total when they can.	
3. Spectator	Barely engaged but doing their share of work, passive.	
2. Faking Contribution	Pretending to do the work, preoccupied with other matters unrelated to work. Blames and finds fault.	
1. Hiding/Apathy	Totally disengaged. Close to deliberate sabotage	

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GOALS



Tis The Set Of The Sail -- Or -- One Ship Sails East
 Ella Wheeler Wilcox
 1855 (Janesville) - 1919

But to every mind there openeth,
 A way, and way, and away,
 A high soul climbs the highway,
 And the low soul gropes the low,
 And in between on the misty flats,
 The rest drift to and fro.

But to every man there openeth,
 A high way and a low,
 And every mind decideth,
 The way his soul shall go.


One ship sails East,
 And another West,
 By the self-same winds that blow,
 'Tis the set of the sails
 And not the gales,
 That tells the way we go.

Like the winds of the sea
 Are the waves of time,
 As we journey along through life,
 'Tis the set of the soul,
 That determines the goal,
 And not the calm or the strife.





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GOALS



'Tis the set of the sails
 And not the gales,
 That tells the way we go



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