

GOAL DRIVEN

Clinic Director Job Checklist

[This is a sample checklist and not complete. It covers the beginning essentials and can be customized by you for your practice.]

A. DESCRIPTION.

The role of the Clinic Director is different than that of business owner or doctor. It is the Chief Executive Officer (C.E.O.) of the business. This is an important distinction because it is a role often not differentiated from the roles of business owner or doctor. It has a different purpose and outcome than these other two roles.

- Goal of Doctor: healthy, happy patients that keep returning.
- Goal of Business Owner: profit.
- Goal of Clinic Director: an efficient and profitable business organization that sustains itself over the long term and that operates at close to full capacity producing very satisfactory customers.

The functions of the Clinic Director include leadership, management, and marketing. It is ideal to have most of the daily and weekly management and marketing delegated. Leadership is the essential role of the clinic director, though each team member also has a leadership role.

The Clinic Director should know the Fast Flow CEO system covered elsewhere.

B. EXPECTATION.

It is expected that the Clinic Director takes full responsibility for all aspects of the business and its successful achievement of its goals. The practice should operate at close to full capacity or steadily move towards this operational goal. The Clinic Director should be fulfilling the tasks of the Clinic Director at the highest level of competence. Their focus is on goals – envisioning and insisting that they are achieved. As the leader, the Clinic Director seeks out strategic improvements and opportunities.

C. GOALS – VISION/PURPOSE

The Clinic Director, as the leader, ensures that the values and purpose of the office are well-known, followed, and embraced by all employees. They also lead by example and are personally engaged in the practice's vision.

D. GOALS – OUTCOMES.

1. Customers who received great outcomes and experience at each visit.
2. Customers who completed their major care program and are very satisfied with the results.
3. Practice operating at close to full capacity
4. Competent team members operating as a competent and goal driven team.
5. All aspects of the practice are improving.
6. Practice network growing and strengthening.

E. PERFORMANCE MONITORS:

1. Visits
2. Completed case programs.
3. Collections
4. New Patients
5. Profit

F. DUTIES Divide them by how often they need to be done.

1. Monthly Duties.

- 1.1. **Know the condition of the clinic.** This is primarily achieved by looking at the office's statistical trends and knowing whether they are headed up or down.
- 1.2. **Monthly management meeting with the manager and management team.** At the end of the month or the very beginning of the new month, it is a good idea to first meet with your manager to review how the business did and make *preliminary* plans for improvement over the next month or two. You will then do the same exercise with the entire team at your major monthly meeting and make any adjustments to your monthly strategy at that meeting.
- 1.3. **Monthly Team Meeting.** Everyone gets together for about an hour at the beginning of the month and follow the Goal Driven team meeting procedure. This accomplishes greater communication among all team members, provides more information about how each team member is doing and allows for a monthly improvement plan.
- 1.4. **Coaching review of the manager.** Meet with your manager and give them feedback on how they are doing. Plan how they can improve.
- 1.5.
- 1.6.



2. Weekly Duties.

- 2.1. Clinic training. Once or twice a month, set up a coaching review and or training session with all clinical team members. Improve quality of care.
- 2.2. As needed, provide coaching reviews to team members without bypassing the manager, focusing on goals, not procedures.
- 2.3.

3. Daily Duties

- 3.1. Brief meetings with the manager to stay informed and pass on management issues.
- 3.2. Friendly, interested conversations with employees done informally now and then.
- 3.3.
- 3.4.

4. Quarterly

- 4.1. Review accounts receivable with the manager and billing manager.
- 4.2. Community Leadership. Develop new and maintain existing relationships within your community.
- 4.3. **Financial.** Review profit and loss with the accountant and manager. Review ROI.
- 4.4.

5.

6. **Yearly.** Review the year-end checklist with your manager.