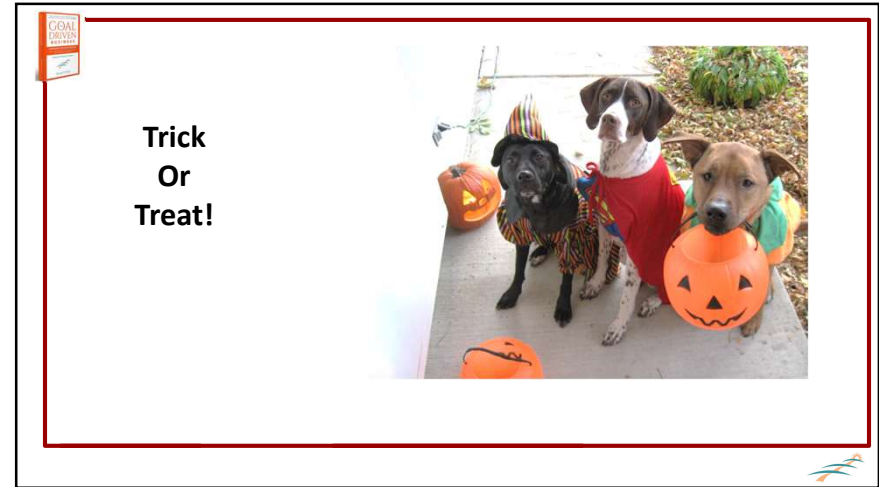


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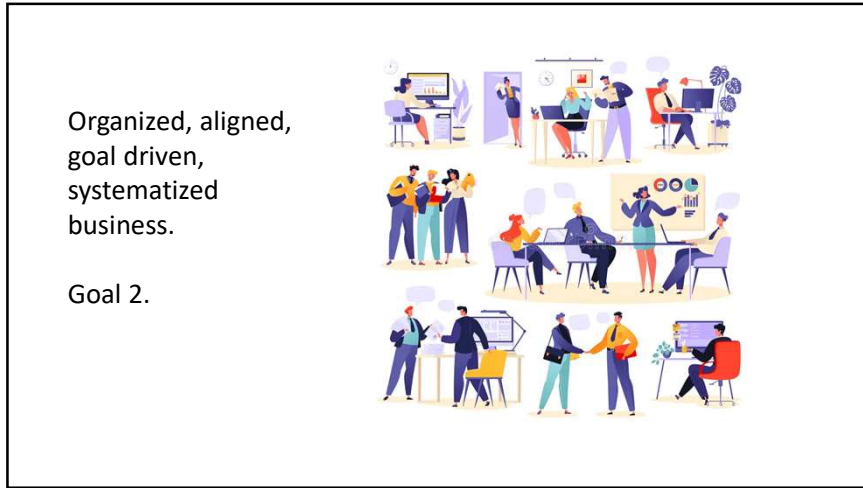
Class 6

0. Regroup
1. Goal Driven Policies and Procedures
2. Individual Improvement
3. Improving Individual Departments.

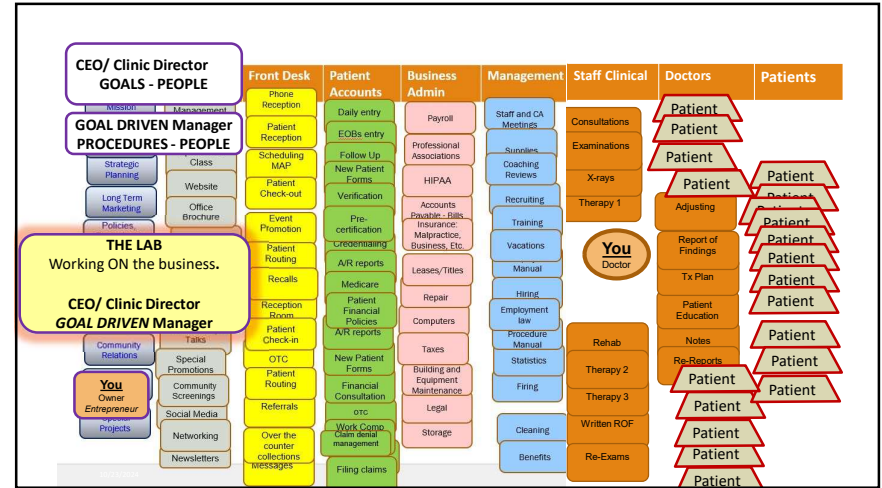
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1. Overview: Structure and Function
2. Policy and Procedures
 - Policy. Employee handbook and general policies
 - Procedures: Checklists Job Checklist Job Manual
 - Checklist for Different Positions - Roles and Goals
 - Videos: 1) Green and Clean (Video) - 2) Staff video on Checklists by EP
 -
2. Individual Improvement
 - Old Model of Practiced Management
 - New Model of Practice Management
 - 3 Goals, Self-Determined Theory, Gallup
 - Hiring and Onboarding (The long sell and inculcrating.)
 - Individual Development Plan
 - Training
 - Coaching Reviews - Get them on track, then improve-reaffirm agreements.

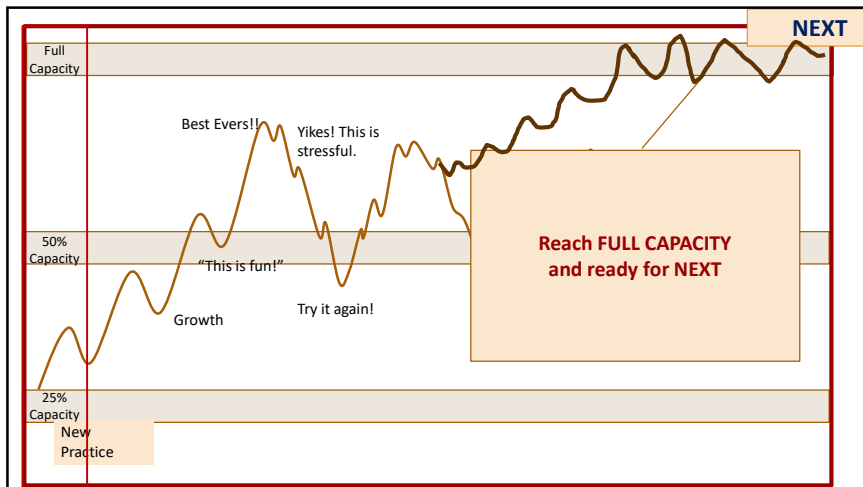
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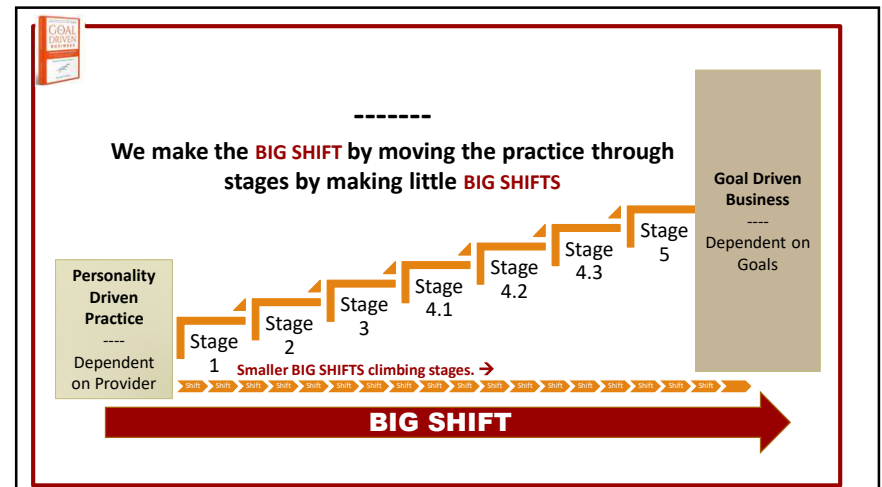
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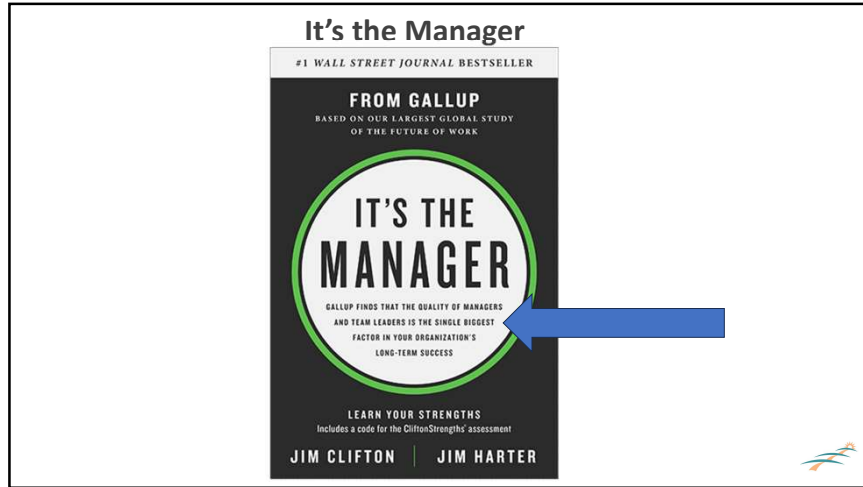
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12



13



- 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**.

GALLUP



THE GOAL DRIVEN MANAGER

14

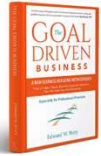



Goal of Goal Driven Practice Manager
To help the team achieve its goals every month through a) *maintenance* and b) *improvement* of team and system performance.



THE GOAL DRIVEN MANAGER

15

THE GOAL DRIVEN MANAGER

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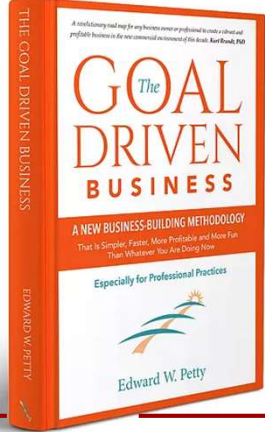


Section III Integrate and Lead

Section II Improve And Strengthen

Section I Produce and Exchange

17



Section II IMPROVE and STRENGTHEN

18

Your 21st Century Writing Curriculum: Leadership Training Curriculum
All classes are held on Wednesdays at 7:00am Central

	1. PRODUCE AND EXCHANGE
Sept 14 Wk. 1	<ol style="list-style-type: none"> 1. INTRODUCTION TO THE PROGRAM 2. Marketing and Production: Producing and exchanging are the bedrock of any business. This class teaches the fundamentals of business: the three pillars. This is the first camp basic. It has 3 parts. Practice Business Basic: 1. The Practice Business cycle, unlike a large business, in a clinical practice, income and your job are inextricably dependent upon the quality and quantity of what you DO yesterday.
Sept 20 Wk. 2	<ol style="list-style-type: none"> Practice Business Basic: 2. Marketing Basics: This is the foundation that has always worked. Practice Business Basic: 3. Service and Delivery Basics. Quality counts. The keys to raving fans.
Sept 26 Wk. 3	<ol style="list-style-type: none"> 1. Evolution of a Practice & Emergent Need for a Management System. Learn why growth requires better management and the rising need for a manager. You will also learn the barriers to growth and how to overcome them! 2. The CEO and the Manager Part 1. Learn the essential goals and roles of the doctor as the practice CEO/Clinic Director and those of the practice manager, including the Four Flow CEO System.
Oct 3 Wk. 4	<ol style="list-style-type: none"> 1. Goals. Learn how to determine the best goals for your business that everyone wants to achieve. 2. Goal Driven Analytics: Your Scoreboard. Learn how to determine how your business is performing by tracking key performance indicators, especially statistics. These are predictive so you can know what to work on for the greatest improvement. 3. The Scale of Responsibility: how do you and your team rate? How to improve it.
	2. IMPROVE and STRENGTHEN
Oct 14 Wk. 5	<ol style="list-style-type: none"> 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 20 Wk. 6	<ol style="list-style-type: none"> 1. Goal/Process Procedures and Policies: you will receive 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: 4. Hourly Cash Billing (Patient Accounts): Therapy.
Oct 26 Wk. 7	<ol style="list-style-type: none"> 1. Managing and Improving Different Departments and Roles: 2. Doctors, your Clinic Director (1), outside services. 2. Marketing Manager system: This system has not led for over 20 years to great practices and take them out of the top and down of the practice roller coaster. You will learn how to create an effective marketing department.
Nov 4 Wk. 8	<ol style="list-style-type: none"> 1. CEO/Manager Part 2: This section is a more advanced look at the role of the CEO and the Manager. Learn more about the Four Flow CEO System, service leadership and management, how the manager "owns 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
	3. INTEGRATE and LEAD
Nov 11 Wk. 9	<ol style="list-style-type: none"> 1. INTRODUCTION TO SECTION 3. 2. Personal Power: Learn how to tap into your authentic power, a necessary ingredient for leadership and happiness, and help others do the same. It begins with integrity and ends with your personal higher goals. 3. Build Team Leadership: We put the finishing touches on your training by showing you how to create a team of Goal Driven leaders, managers, and marketers working together to help each other achieve the practice's goals.
Nov 18 Wk. 10	<ol style="list-style-type: none"> 1. Course Review 2. NEXT: Your new game -- for you, your team, and your patients: Using goals to win and keep it fun. Game Theory: creating the future for the practice, your patients, and yourself. 3. Group Discussion
Nov 24 Wk. 11	Break: Review & Prepare.
Dec 2 Wk. 12	Presentations, Graduation, Party with Green Drinks!

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The 6 P's of the *Fast Flow* CEO Method

CEO	1.	Purpose -- Higher Goals: Values, Purpose, Mission.
CEO	2.	People -- The team. Each team member. (Goals focus.)
Manager	2.	People -- The team. Each team member. (Procedures focus.)
Manager	3.	Policy -- Broad clinic rules.
Manager	4.	Plans -- General strategy for week, month, or more.
Manager	5.	Procedures -- Routine actions steps, checklist
CEO	6.	Products -- Practical Goals: Outcomes. Quality and Quantity

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The 6 P's of the *Fast Flow CEO Method*

Everything is done twice

1 st Goal →	CEO	1.	Purpose – Higher Goals: Values, Purpose, Mission.
	CEO	2.	People -- The team. Each team member. (Goals focus.)
	Manager	2.	People – The team. Each team member. (Procedures focus.)
	Manager	3.	Policy -- Broad clinic rules.
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	Manager	5.	Procedures -- Routine actions steps, checklist
2 nd Goal →	CEO	6.	Products -- Practical Goals: Outcomes. Quality and Quantity

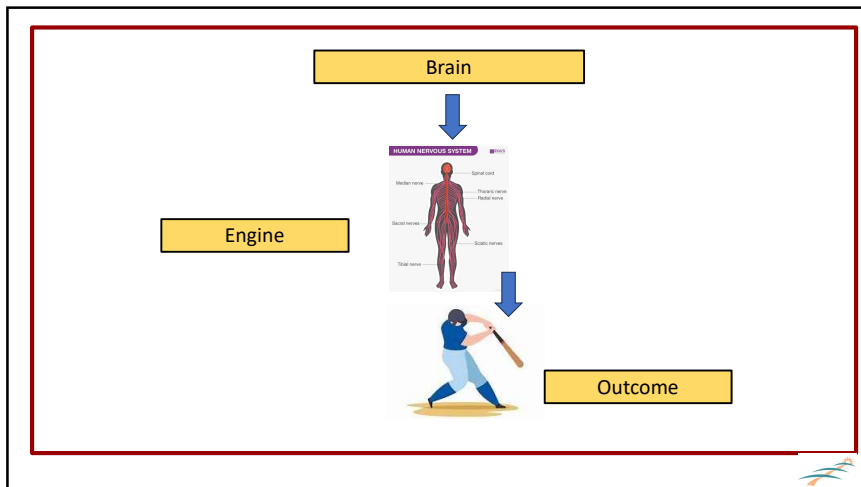
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The 6 P's of the *Fast Flow CEO Method*

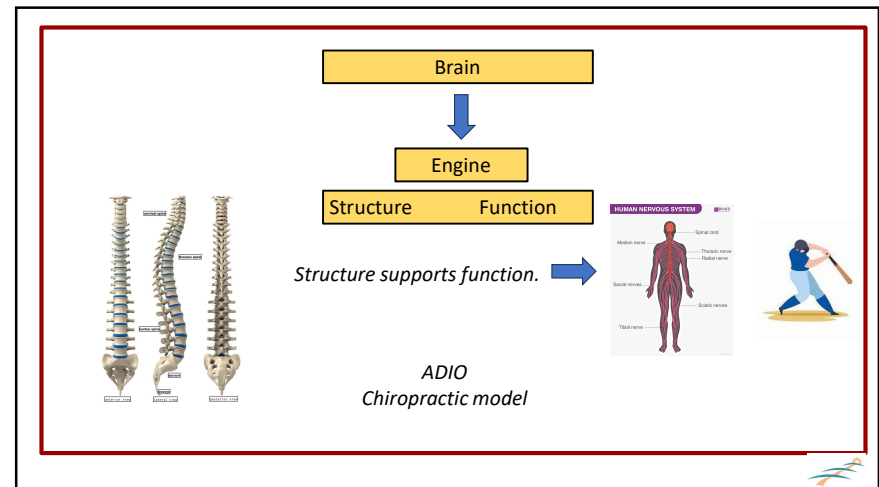
Everything is done twice

1 st Goal →	CEO	1.	Purpose – Higher Goals: Values, Purpose, Mission.
	CEO	2.	People -- The team. Each team member. (Goals focus.)
The Bridge that makes the 2 nd goal happened. Engine room! →	Manager	2.	People – The team. Each team member. (Procedures focus.)
	Manager	3.	Policy -- Broad clinic rules.
	Manager	4.	Plans – General strategy for week, month, or more.
	Manager	5.	Procedures -- Routine actions steps, checklist
2 nd Goal →	CEO	6.	Products -- Practical Goals: Outcomes. Quality and Quantity

22


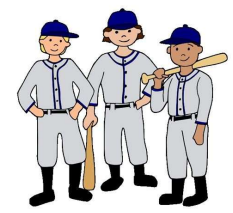


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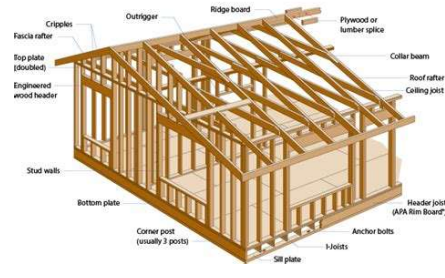
Structure Function





25

Structure Function


LIGHT-FRAME CONSTRUCTION






26

Structure Function






People

Policies – Rules
Procedures – Techniques
Plans – Improvements (Goals Achievement Process – Kaizen)

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Structure Function



Vision (Purpose)

- **Policies – General Overall Rules**
- **Procedures – Techniques**
- **Plans – Improvements**

Outcomes (Products)



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Policies – General Overall Rules

Must go to 1st before going to 3rd.
3 strikes = out

Procedures – Techniques


Pitcher: how to throw a curve ball.
Short Stop: how to make a double play.

Plan – Improvements

We are playing the Orioles. Pitcher throws mostly sliders.
Shortstop needs to practice grounders.
More batting practice.



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Practice Playbook has both Policies and Procedures

- Employee Handbook – Hours, HIPAA, vacations, general employee rules. Policies.
- General Practice Policies. Updated and added practice policies
- Job Checklists – list of duties (procedures) for each major role in the office.
- Job Manuals – “how to” manual of how to do each duty for a major role in the office. Procedures.

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Employee Handbook


Basic rules and guidelines.

- Vision – Core Values, Purpose, Mission
- Complete Outcome
- Full Capacity
- Hours
- Vacations
- Dress code
- HIPAA
- Other

Download on www.PMAMembers.com or on references in Manager Club site and edit or create your own employee handbook.

Review and update yearly, as needed.

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General Policies

You can add policies as needed. Add to it and update regularly. I would keep a hard copy with employee signatures to testify they had read and understand the policy.


File: c:/Practice Playbook/Employee Manual
Date: March 4, 2024 (last revised July 3, 2024)

Policy Memo
Subject: No More Taylor Swift Music Allowed

Because we have been playing TS music every day for the last 4 months, it will no longer be allowed within 1 mile of the clinic.

Signed,
Dr. Brutal Metal

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Practice Playbook


Add to it and update regularly. I would keep a hard copy with employee signatures to testify they had read and understand the policy.

Keep it simple. Only the VITAL info. (80/20)

Then, *refer* your people to it.
Keep a digital version that you can easily update.

In the end, no amount of policies will take the place of an understanding, agreement with, and striving for the **GOALS** of the practice. This is why we begin with goals first.

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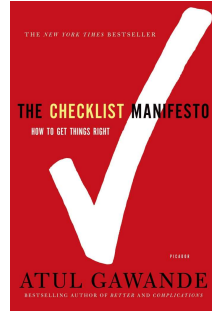
The Checklist

A list of procedures.

Procedural Atrophy

Atrophy: A wasting away, deterioration, or diminution.

34



The Checklist

“What is needed... is discipline.
Discipline is hard — harder than trustworthiness and skill and perhaps even than selflessness.

We are by nature flawed and inconstant creatures. We can't even keep from snacking between meals. We are not built for discipline. We are built for novelty and excitement, not for careful attention to detail. Discipline is something we have to work at.

Good checklists, on the other hand, are precise. They are efficient, to the point, and easy to use even in the most difficult situations. They do not try to spell out everything—a checklist cannot fly a plane.
Instead, they provide reminders of only the most critical and important steps—the ones that even the highly skilled professional using them could miss.

Good checklists are, above all, practical.”

-Atul Gawande, M.D., Endocrine Surgeon, Associate Professor at Harvard. (The Checklist Manifesto)

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Checklist of Procedures

sample

Front Desk Coordinator Job Checklist of Procedures

Goal: Mission: to help all our customers achieve their service goals by scheduling them and helping them keep their schedule.

Goal: Outcomes: all customers keeping to their schedule, the appointment book is fully scheduled each day, all appointments kept each day.

Key performance indicators: % full schedule day/week, Total Visits, % kept appointments, Over the counter collections.

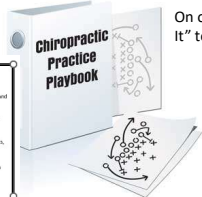
Level of Performance Expected: 90% kept Appointment, 60% new patients to their 30th visit.

Was this done - Never (1) Sometimes (3) or Always (5)	1	2	3	4	5
Daily:					
1. Always greeted the customer with a smile.					
2. Always answered the phone with a smile.					
3.					
4.					
Weekly:					
1.					
2.					
3.					
Monthly:					
1.					
2.					
3.					
Yearly or as needed					

1. Begin with the end in mind.
2. Higher Goal: Mission
3. Practical Goal: Outcome
4. Performance indicators:
5. Expectation
6. Most important items

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Checklist of Procedures



On occasion, add a procedure memo, a "How to Do It" to a manual for your specialized role. For example:

File: c:\Practice Playbook\Team Member Section
Date: March 4, 2024 (last revised July 3, 2024)

Procedure Memo

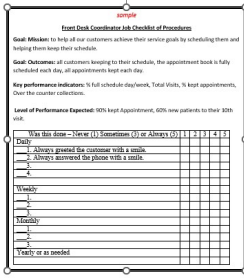
Subject: **How to Smile at or with a Patient**

When you see a patient, or talk with one on the phone, try to recognize what is good about them.

This should make you feel good about them and evoke a smile on your behalf.

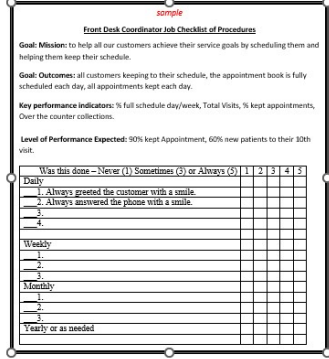
If you can't do that, put a mirror above your workstation. Write a small sign or caption underneath it that says: Show Your Teeth!

Signed,
Ben Casey



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Checklist of Procedures



Every goal has a role to achieve it.

Some are major, like Patient Accounts, Doctor, and others are not. "Open office and prepare office in the morning" is a small but important role. (Therapist, Front desk.)

End of Year Checklist! (Manager, or Clinic Director)

Many of these roles are minor and simply added to existing roles. Still, it is helpful to itemize the duties because of **Procedural Atrophy**.

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Job Checklists for Different Positions

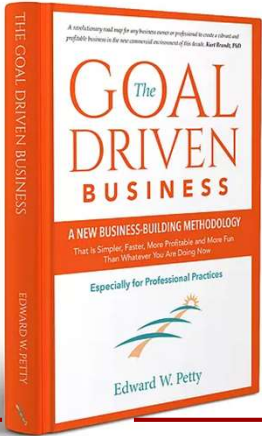
- **Specialist** – Specific roles in the offices. A team member could have several different roles. Front desk and backup therapy, for example.
- **Team Member** – Defined by the mission and core values of the practice. Takes ownership for the entire practice by contributing to needed **marketing, leadership and management** of the practice. (SEALS – Jocko Willink, Extreme Ownership)

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Stage of Development	Business Owner	CEO Clinic Director	Office Management	Front Desk	Doctors	Therapy-Clinical Support	Wellness - Case Management	Billing-Patient Accounts	Marketing	Team
5. At or close to capacity. Total Team Leadership. Clinic runs smoothly as a team, is happy, and requires little daily management	A solvent, viable, business in compliance. Risk free. (Taxes, compliances, insurance, legal etc.)	"Dr. and team focused on higher purposes. Long term consistent plan. -Motivated & motivating others. -Goal setting and constant improvement.	Efficient, organized, competent productive group – following procedures in Practice Playbook, constant training. Happy Patients	Appointment book full, money collected, referrals generated. Happy Patients!	Patients getting healthier and relieved of discomforts, and well educated so that they go on to wellness care and refer. Happy patient!	Excellent clinical services provided to patients in order to support doctor's care. Educating Patients. Happy Pts.	Patients completing treatment programs, happy doing well on a wellness program. Patients sticking with care. Happy Patient!	Zero balances, patients understanding and agreeing to financial terms. Patients returning patients. Waiting list. Happy Patient!	Effective marketing procedures routinely implemented creating lots of new patients and returning patients. Waiting list. Happy Patient!	A team that works together to achieve mission. Synergy high. Extreme ownership and responsibility. Enjoy helping each other to manage office and patients.
4. Maturing 50-70% capacity.										
3. Stable Growth 30-50% capacity.										
2. Unstable Growth, but solvent.										
1. Beginning Growth or Re-growth.	Not solvent, not legal. At unnecessary risk.	Dr. & team not motivated. Working just for paycheck? No or inaccurate director & plan	Disorganized, no regular improvement program. Policies/procs not followed.	Appt book empty, not ensuring patients come in.	Doctors bored, uncaring, not focused. Pts not happy. Medicare outcomes.	Therapy bored, not caring, not educating, slow Pts not happy.	Patients leaving prematurely. Patients not happy.	Patients leaving due to financials, money not collected.	No or too little marketing procedures. No on in charge. Not enough NPs or RCPs.	Low purpose, robotic, low initiative, disorganized, dog eat dog.

Specialized roles/functions in the office. One person may be directly responsible for more than one area.

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PEOPLE

Individual Improvement

- Old Model of Practiced Management
- New Model of Practice Management
 - 3 Goals, Self-Determined Theory
- Hiring and Onboarding (The long sell and inculcating.)
- Individual Development Plan
- Training
- Coaching Reviews - Get them on track, then improve- reaffirm agreements.

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The New Model of Practice Management

Employee as a Goal Driven Expert

- Gallup
- 3 Goals
- Self-Determination Theory

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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

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Summary of the Old Model of Practice Management

- Business owners do not expect employees to become experts or professionals.
- Employees do not expect to become experts or professionals.
- Little or no training is provided, outside the bare minimum or to keep up with new regulations. Employees don't expect to study and train on their own time and they receive no reward if they do. Employees are not included in management decisions or are not empowered to create solutions for work issues.
- Work is performed with little context for the higher purpose of the business.
- Employees aren't encouraged to incorporate into their work life their own greater goals that align with those of the company.
- Employees aren't hired, educated, and reviewed based on the core values of the business and its higher purposes.
- Employees are not rewarded but are often criticized.
- Motivation is based on avoiding criticism and not getting into trouble.

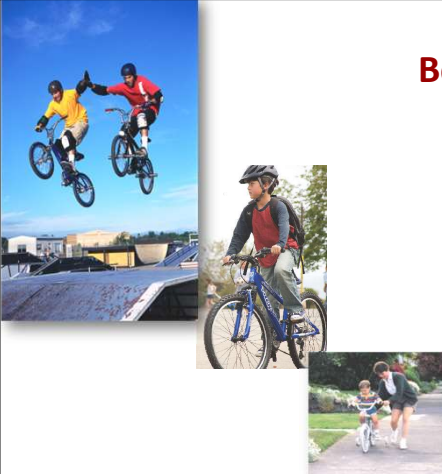
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Employee as a Goal Driven Expert
3 Goals and Self-Determination Theory

	PATIENT	BUSINESS	PROFESSIONAL
GOAL 3	Wellness	Greater purposes of the business and its people – happy owner and staff, contributions outside of business to community.	<ul style="list-style-type: none"> Personal and Family Pursuits Long range effect on patients and families Impact in the community
GOAL 2	Correction	A well structured, strong business with systems and people in alignment with common goals.	<ul style="list-style-type: none"> Expert Mastered procedures and skills of professional roles. Employment security, better compensation.
GOAL 1	Relief	Profit from Production from Marketing (Business Cycle)	<ul style="list-style-type: none"> Contributing satisfactorily to get paid and not be fired!

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Becoming an expert.
Proficiency



5. Expert.
4. Advanced Intermediated.
3. Intermediate.
2. Advanced Beginner.
1. Beginner.

(c) 2015, Edward Petty sm (service mark)

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Self-Determination Theory
Inside → Out



It states we all have innate drives and natural needs that propel us to be more self-determined, as opposed to determined or controlled by outside forces.

External motivation can only motivate us so far, like the fear of being fired. Threats, criticism, and negative reinforcement produce short-term action, but in the end, they demotivate.


These innate drives are: 1) autonomy, 2) competence, and 3) relatedness—and they correspond with our Three Goals.

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AUTONOMY


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COMPETENCE



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RELATEDNESS


Being Part of a Team

Working with others,
being part of something
bigger, not being
excluded.

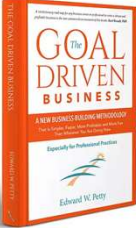
Purpose Our Greater Goals

"Autonomous people working toward
mastery perform at very high levels.

But those who do so in the service of
some great objective can achieve even
more. The most deeply motivated
people—not to mention those who are
most productive and satisfied—hitch
their desires to a cause larger than
themselves." Daniel Pink



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Individual Improvement

Employee Life Cycle

1. Recruiting
2. Hiring
3. Onboarding
4. Engaging
5. Performing (producing)
6. Developing (improving, becoming expert) and, at a future time,
7. Transitioning off staff.



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Before you recruit...

1. Work out what role you need exactly.
2. Work out cost and what you can pay.
3. Are there alternatives?
4. Do you want full time, part time.
5. What strengths you are looking for.
6. What you are willing to offer:
 - Pay
 - Benefits
 - Advancement
 - Culture

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GOAL DRIVEN

Advertise

Get the word out.

1. Indeed and other Internet platforms.
2. Word of mouth – patients, family, friends.
3. Professional association.
4. Networking.
5. Internships – associates, community colleges
6. Agency.

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GOAL DRIVEN

Prospective Candidates

1. Take in applications and resumes.
2. Review them.
3. Ask to complete short survey.
4. Telephone interview.
5. Personal Interview.
6. 2nd Interview with team.
7. Check references and background.
8. 3rd Interview – Working Interview

(Zappos)

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GOAL DRIVEN

The 5 C's in interviewing: What to look for ...

1. **Character.** Authentic. Honest. On time for meetings. Dressed well (shows respect). Not a job-hopper. Good references.
2. **Career-minded.** Not gig-minded. You want at least a two year commitment. The first 6 months is training and acclimation. (Takes longer than you might think!)
3. **Competent.** There are tests on Indeed, for example. Trainable.
4. **Chemistry.** Are they friendly and do you feel comfortable around them.
5. **Core Values.** Do their values, from research and interviews, line up with yours?

**Take your time. Don't compromise.
If unsure, another working interview.**


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GOAL DRIVEN


Onboarding

The goal of onboarding is that they are now oriented and educated as a **Team Member** of your office.

SEALS



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Onboarding

Use a checklist of actions for new employees.
Who is their in-office buddy they can ask questions?
Lunch with owner. History of practice, goals, core values, outcomes, full capacity, expectations, history of profession, why of profession, social significance, and more.


- The goal of onboarding is that they are now oriented and educated as a **Team Member** of your office.
- The specialized training is done on the job, as an apprentice, supported by training sessions, webinars, classes, seminars, books, and coaching reviews.

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In-Office Team and Individual Training

- Books
- Videos
- Webinars
- Online courses
- Seminars
- Coaching

Present and teach at team meeting what they learned. To teach is to learn twice!
 (Covered in Class 1)



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The Coaching Review

Conversation and consultation.

Let the team member know that this is what we do.
The goal is to check-in, see how things are going, and then see what could be improved.

The One Minute Manager (Ken Blanchard)
 1 minute praise
 1 minute reprimand
 1 minute goal setting

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The Coaching Review

1. Check-in. How's it going? How're things.
2. Something good. Reinforce.
3. Something needs improvement. Plan to fix.
4. Goals.

Refer to something in writing (job checklist, core values, etc.)
Keep basic simple notes.
Bonus – update job checklist.

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The Coaching Review

- Be Prepared.** Review the team member's performance over the last period. Note 2-3 activities that they have improved on and 1-2 activities that need improvement. Base these upon items in their written department or job checklist and or statistics.
- Schedule 10-30 minutes.** for the coaching review with the team member. If they are new and need lots of coaching, 30 minutes weekly. And if they are doing great and are veterans, 5-10 minutes every month - or take them to lunch as a reward.
- Go over the procedure with them so that they know What the Heck you are up to -- and the purpose. Check-in, feedback, and support.**
- How Are They Doing?** Check in on how things have been going, generally. Get personal if appropriate. Be interested in how they are doing -- in life and in the office. Try to understand what is going on from their point of view. Seek to understand.
- Go Over the Improved Areas.** Give feedback and praise - let them know how genuinely pleased you are with their good work. Ask how they can *keep it improving* and if they need any help. Give them tips and coach them as appropriate.
- Go Over Areas for Improvement.** Give them feedback and lightly let them know you are unsatisfied with that specific outcome. (Don't be mean - a slight disapproval goes a long way.) Refer to written materials like their job checklist and statistics. . May need to set up an coaching/training time later.
- Goals.** Have them set 1-3 goals for the next time period.
- Notes.** You can have the team member keep notes, and you can as well. This can be useful in the future if you need to document your meetings.
- Job Checklist.** You can also ask the team member to bring their job checklist and go over any tasks that they think should be improved upon. It is their sandbox!

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Individual Development Plan 1st 6 months of 2025

Team Member: _____ Manager/Director: _____ Date: _____

Goal Driven Professional Development					
GOALS	ACTION STEPS	SUPPORT	SUCCESS CRITERIA	COMPLETION DATE	
Goal 1:	What do I want to do or do better?	What methods will I use to achieve my learning objectives?	Support I would like	How will I recognize my success?	
Goal 2:					
Goal 3:					
Goal 4:					

Team Member: _____ Manager/Director: _____ Date: _____

Goal Driven Personal Development					
GOALS	ACTION STEPS	SUPPORT	SUCCESS CRITERIA	FOLLOW UP DATE	COMPLETION DATE
Goal 1:	What do I want to do or do better?	What methods will I use to achieve my learning objectives?	Support I would like	How will I recognize my success?	
Goal 2:					
Goal 3:					
Goal 4:					

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Stage of Development	Business Owner	CEO/Clinic Director	Office Management	Front Desk	Doctors	Therapy/Clinical Support	Wellness - Case Management	Billing-Patient Accounts	Marketing	Team
5. At or close to capacity. Total Team Leadership Clinic runs smoothly as a team, is happy, and requires little daily management	A solvent, viable, business in compliance. Risk free. (Taxes, compliances, insurance, legal etc.)	Dr. and team focused on higher purposes. Long term consistent plan -Motivated & motivating others. *Goal setting and constant improvement	Efficient, organized, competent productive group -- following procedures in Practice Playbook, constant training. Happy Patients	Appointment book full, money collected, referrals generated. Happy Patient!	Patients getting healthier and relieved of discomforts, and well educated so that they go on to wellness care and refer. Happy patients!	Excellent clinical services provided to patients in order to support doctor's care on a wellness program. Educating Patients. Happy Pts.	Patients completing treatment programs, happily doing well on a wellness program. Happy Patient!	Zero Balances, patients understanding and agreeing to financial terms. Patients sticking with care. Happy Patient!	Effective marketing procedures routinely implemented creating lots of new patients and returning patients. Waiting list. Happy Patient!	A team that works together to achieve mission. Synergy high. Extreme ownership and responsibility. Enjoy helping each other to manage office and patients.
4. Maturing 50-70% capacity.										
3. Stable Growth 35-55% capacity.										
2. Unstable Growth, but solvent										
1. Beginning Growth or Re-growth.	Not solvent, not legal. At unnecessary risk.	Dr. & team not motivated. Working just for a pay and \$ No or - At unnecessary expense & plan	Disorganized, no regular improvement program. Policies/procs not followed.	Apppt book, mostly or empty. Not ensuring patients come in.	Doctors bored, uncaring, not educating, slow Pts not happy. Medicare outcomes.	Therapy bored, not caring, not educating, slow Pts not happy.	Patients leaving prematurely. Patients not happy.	Patients leaving due to finances, money not collected.	No or too little marketing procedures. No on in change. Not enough NPs or RCI's.	Low purpose, robotic, low initiative, disorganized, dog eat dog.

Specialized roles/functions in the office. One person may be directly responsible for more than one area.

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How to Manage Different Roles and Departments

- Statistics
- Performance Indicators (Happy patients, attendance, etc.)
- Coaching Review
- Training

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Study assignments posted by tomorrow am – will include

- Some reading
- 2 short videos
- Do coaching reviews
- Teach your Clinic Director
- Make a job checklist using the format we discussed.
- Next class, give a report on:
 - How your coaching review went, or
 - Your job checklist!

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We are in the improvement business!

We Help Each Other Help Others

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Class 5

Symptomatic Management
Roller Coaster
Stunted achievement
Extra Stress
Less profit
Less fun!

This is where we want to go! →

Team Managed Systematized Goal Driven

Less Stress
More Profit
Better Service
More Fun

Goals for the business
For the patient.
And for you!

Goal Driven Business

Dependent on Goals

Personality Driven Practice

Dependent on Provider

In a Personality Driven Practice, the doctor has a job with part time or full-time assistants. It roller coasters - goes up and hits barriers and goes back down. Everything is dependent upon the doctor.

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Personality Driven Practice

Dependent on Provider

Stage 1 → Stage 2 → Stage 3 → Stage 4 → Stage 5 → Stage 6

Smaller BIG SHIFTS →

BIG SHIFT

Goal Driven Business

Dependent on Goals

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Goal of Goal Driven Practice Manager
To help the team achieve its goals every month through a) *maintenance* and b) *improvement* of team and system performance.



THE GOAL DRIVEN MANAGER

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The future of space travel.



The future of management and leadership.



THE GOAL DRIVEN MANAGER

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