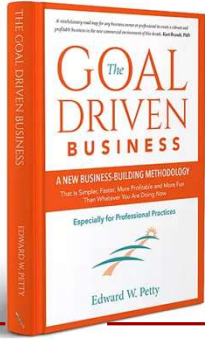


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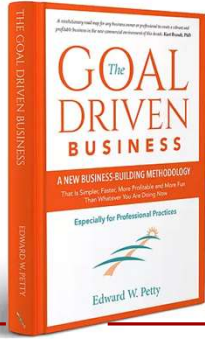


Class 4.

Lesson 1
Goals
Goals for your patients,
your practice, and you.

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

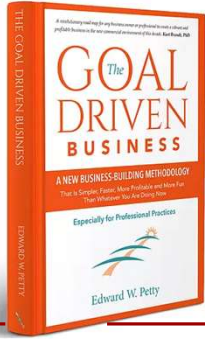
2



Regrouping

- Wins!
- Teaching your Clinic Director?
- Training Partner?
- Share Sessions.
- Communication is 80/20
- Capstone
-

3



Class 4.

Lesson 1
Goals
Goals for your patients,
your practice, and you.

4



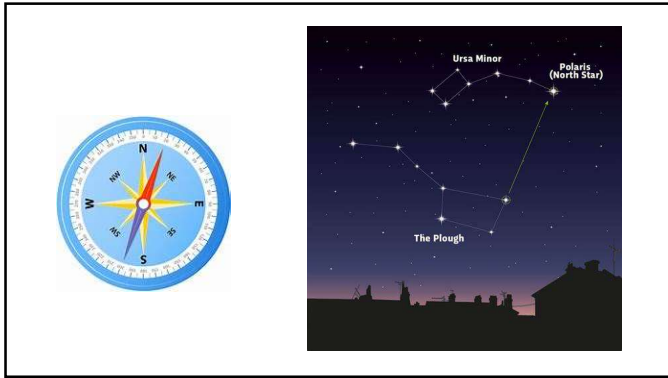
5

Goals orient us.

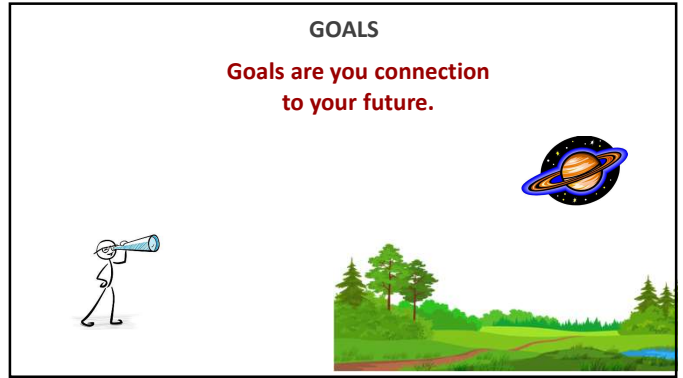
**They point the way to the future –
to where we want to go.**

They deal with the end in mind.

6



7



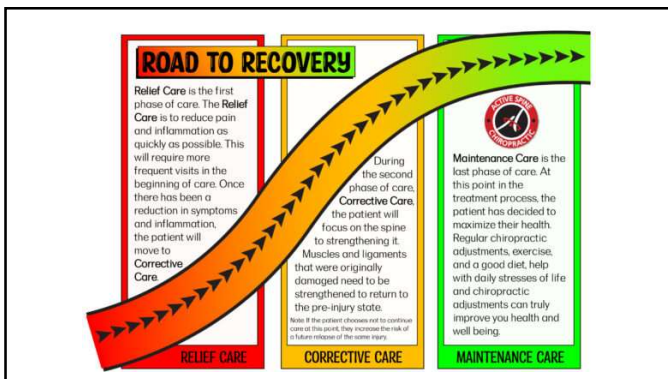
8



9

The Three Phases of Chiropractic Care		
Phase 1	Phase 2	Phase 3
<p>Relief Care</p> <p><i>If you are in pain when you come to our office, the first objective is to help you feel better.</i></p> <p><i>Depending on the severity of your problem, it is typical to be treated 2-3 times per week for 4-12 weeks.</i></p>	<p>Corrective Care</p> <p><i>During the corrective care phase, muscles and other tissues are allowed to heal more completely, thereby helping prevent re-injury.</i></p> <p><i>It is typical to be treated 2-4 times per month for 4-24 months, depending on your overall health and severity of your problem.</i></p>	<p>Maintenance Care</p> <p><i>Once your body has fully healed, it is important to come in for periodic adjustments to avoid problems in the future.</i></p> <p><i>Usually this only requires a quick visit to the chiropractor about once a month or so.</i></p>

10



11

The slide is titled 'The 3 Phases of Care'. It features a graphic titled 'Three Types of Care' with a spectrum of colored circles representing different care levels. Below the graphic, there are three columns of text:

- Initial Intensive Care:** This is the first phase of care. It is designed to reduce pain and inflammation as quickly as possible. This will require more frequent visits in the beginning of care. Once there has been a reduction in symptoms and inflammation, the patient will move to Corrective Care.
- Corrective Care:** During the corrective care phase, muscles and other tissues are allowed to heal more completely, thereby helping prevent re-injury. It is typical to be treated 2-4 times per month for 4-24 months, depending on your overall health and severity of your problem.
- Elective or Wellness Care:** Once your body has fully healed, it is important to come in for periodic adjustments to avoid problems in the future. Usually this only requires a quick visit to the chiropractor about once a month or so.

 At the bottom, there is a photo of a smiling woman and the text: 'How long you decide to benefit from chiropractic care is always up to you.'

12

The 3 Goals of Care

PATIENT	
GOAL 3	Wellness
GOAL 2	Correction Strengthen
GOAL 1	Relief



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The 3 Phases of Care

PATIENT	BUSINESS
GOAL 3	Wellness
GOAL 2	Correction
GOAL 1	Relief Profit from Production from Marketing (Business Cycle)

15

The 3 Phases of Care

PATIENT	BUSINESS
GOAL 3	Wellness
GOAL 2	Correction Symptomatic Management
GOAL 1	Relief Profit from Production from Marketing (Business Cycle)

16

The 3 Phases of Care

PATIENT	BUSINESS
GOAL 3	Wellness
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)

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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)

18

	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!

19

Eisenhower Matrix –

The diagram shows an Eisenhower Matrix with a photo of Dwight D. Eisenhower on the left and a portrait of a man on the right. The matrix is divided into four quadrants, with the top-right quadrant labeled '2' and 'y.' Below the portrait, there are two bullet points: 'Reimbursement type' and '?'. A small logo is in the bottom right corner.

20

Eisenhower Matrix – Stephen Covey Patient Care

	URGENT Goal 1	NOT URGENT Goal 2
IMPORTANT	<ul style="list-style-type: none"> Making patient feel understood. Patient feeling better. Patient feels welcome in a friendly environment. Patient finances worked out. 	<ul style="list-style-type: none"> Patient educated on care plan. Patient agreeing to care plan. Patient health improving. Patient stronger, happier, more active. Progress exam and report.
NOT IMPORTANT	<ul style="list-style-type: none"> Sales call from health vendor Patient concerned about being late. What shoes they are wearing 	<ul style="list-style-type: none"> Reimbursement type ?

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Eisenhower Matrix – Stephen Covey Business

	URGENT Goal 1	NOT URGENT Goal 2
IMPORTANT	<ul style="list-style-type: none"> Income Profit New Customers WOW Service Paying Bills PRODUCTION 	<ul style="list-style-type: none"> Vision, Mission, Purpose Values Completed Outcomes Professional Training Coaching, practice Planning Communication ORGANIZATION
NOT IMPORTANT	<ul style="list-style-type: none"> Telemarketing calls. Most questions during work. Fretting over minor errors. Hallway questions, decisions 	<ul style="list-style-type: none"> Gossip. Social media. Non emergency texts, calls. Personal issues from day before.

22

Beyond the important – THE MEANINGFUL

Goal 3 Meaningful Goals

- Family
- Spiritual
- Travel
- Education
- Recreation
- Health
- Environment
- Local Community
- Friends
- Humanity

23

HOW TO USE GOALS

GOAL 1 Urgent and important PRODUCTION	<ul style="list-style-type: none"> Visits Collections, New Patients Charges Quality Indicators 	<ul style="list-style-type: none"> Quality Performance Indicators 	<p>These defined, tracked, goals set, are reviewed and set monthly, and even weekly.</p>
---	--	--	--

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Patient Goals

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HOW TO USE GOALS **PATIENT OUTCOMES**

Define what it is you are producing.
 An example of a complete outcome would be a pizza that is cooked, with all the toppings, tasty, and mostly nutritious.

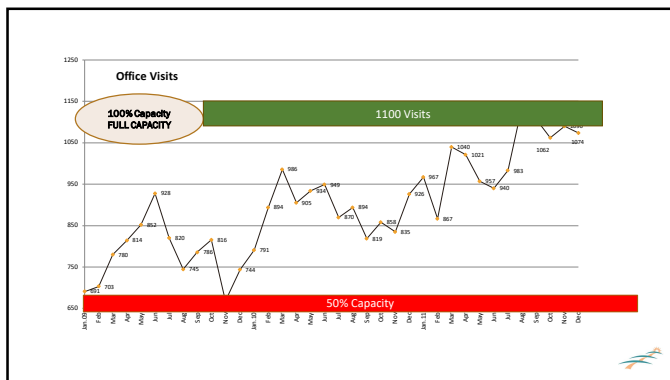
Sub-outcomes would be: a heated oven, kneaded dough, cut and prepared toppings on uncooked dough.

GOAL 1
 Urgent and important

Sample: Symptomatic care: Patients adjusted a few times so they feel better.. or

- **Partial Patient Outcome.** Received an adjustment or treatment and experienced relief or was extremely satisfied.
- **Patient progress exam.** Doing better objectively and very pleased subjectively.
- **COMPLETE PATIENT OUTCOME** – A customer who is relieved of pain, healthier, and educated so that they *will continue improving their health, and thrilled with their care and service.*

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HOW TO USE GOALS

**“Sharpening the saw!”
Mastery**

GOAL 2
 Important not urgent
 ORGANIZATION

GOAL 1
 Urgent and important
 PRODUCTION

- Visits
- Collections, New Patiens
- Charges
- Quality Indicators

Quality Performance Indicators

These goals are reviewed and set monthly, and even weekly.

28

HOW TO USE GOALS

GOAL 2
 Important not urgent
 ORGANIZATION

- Team training goals 2 hours every 2 months.
- Individual Team training goals 2 hours a month. Seminars, certifications, etc.
- Adherence to policies and procedures
- Improvement in application of policies and procedures
- Monthly G.A.P – KAIZEN
- Income divided by Full Time Employee (\$/FTE)

GOAL 1
 Urgent and important
 PRODUCTION

- Visits
- Collections, New Patiens
- Charges
- Quality Indicators

These goals are reviewed and set monthly, and even weekly.

29

Becoming an expert. Proficiency

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

© 2014 Edward Petty sm (service mark)

30

Becoming an expert TEAM.



Proficiency

5. Expert team members in-synch going for the same goals and helping each other doing so.
4. Working as experts together and having fun doing so.
3. Working together with reservation.
2. Work grudgingly with each other just to keep their job.
1. Chaotic and disaffected and confused. Edward Pety am (Service mark)



31

GOAL 3- HIGHER GOALS (MEANINGFUL)

SAMPLE CHIROPRACTIC CENTER

MISSION

To improve the health of our community by seeing as many people as possible so that they can regain their health naturally through chiropractic care and to educate them so they can continue to stay healthy and educate others about what they have learned.

- DR. SAMPLE AND STAFF

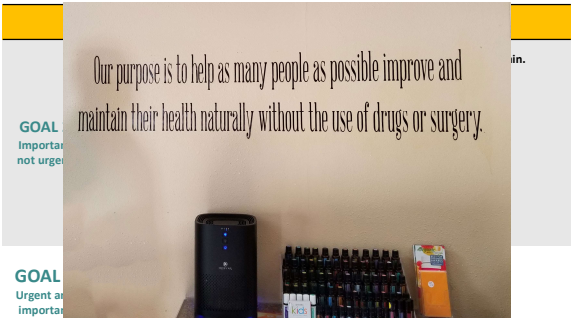
One upstart team painted on the doctor's office wall behind the front desk!




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HOW TO USE GOALS – GOAL 3


Our purpose is to help as many people as possible improve and maintain their health naturally without the use of drugs or surgery.






33

HOW TO USE GOALS – GOAL 3






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HOW TO USE GOALS – GOAL 3

VISION

- **CORE VALUES AND BELIEFS.** Philosophy, Principles
- **PURPOSE.** Grows out of core values. The WHY.
- **MISSION.** Bold audacious goal. Has a finish line.

Defined by Collins



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HOW TO USE GOALS – GOAL 3

VISION

CORE VALUES AND BELIEFS

A system of guiding principles and tenets; a philosophy of business and life. Principles that are to be held inviolate.

An extension of the personal core values and beliefs of the leaders of the organization.

PURPOSE

The fundamental reasons for the organization's existence. Grows out of core values.

Like a guiding star always worked towards, but never fully attained.

Should serve to guide the company for 100 years.


MISSION

A bold, compelling, audacious goal. Has a clear finish line and a specific time frame. Once completed, a new mission is set.

4 TYPES:

1. Targeting
2. Commitment
3. Role Model
4. Internal Transformation

Collins, Jim. BE 2.0 (Beyond Entrepreneurship 2.0): Turning Your Business into an Enduring Great Company (p. 95). Penguin Publishing Group. Kindle Edition.



36

HOW TO USE GOALS – CORE VALUES

Values –
Tony Hsieh -- Zappos

“Your personal core values define who you are, and a company’s core values ultimately define the company’s character and brand.

For individuals, character is destiny.

For organizations, culture is destiny.”

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What is your work culture?



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HOW TO USE GOALS – CORE VALUES

Zappos Core Values

1. **Deliver WOW Through Service:** Strive to exceed customer expectations and provide exceptional service.
2. **Embrace and Drive Change:** Be open to change, adapt, and actively seek opportunities for improvement.
3. **Create Fun and a Little Weirdness:** Encourage a fun and unique work environment that fosters creativity and individuality.
4. **Be Adventurous, Creative, and Open-Minded:** Pursue new ideas, take calculated risks, and think outside the box.
5. **Pursue Growth and Learning:** Continuously seek personal and professional development.
6. **Build Open and Honest Relationships with Communication:** Foster trust and open communication within the organization.
7. **Build a Positive Team and Family Spirit:** Create a supportive and collaborative team culture.
8. **Do More with Less:** Be resourceful and efficient in your work.
9. **Be Passionate and Determined:** Show dedication and enthusiasm for your work and goals.
10. **Be Humble:** Maintain a humble and down-to-earth attitude, regardless of success.

GOAL 3
Meaningful

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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

Goal 3 - Meaningful Goals	CEO	1.	Purpose – Higher Goals: Values, Purpose, Mission.
	CEO	2.	People -- The team. Each team member. (Goals focus.)
Goal 2 - Organization	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.
Goal 1 - Production Goals	Manager	5.	Procedures -- Routine actions steps, checklist
	CEO	6.	Products -- Practical Goals: Outcomes. Quality and Quantity

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Eisenhower Matrix – Stephen Covey

Business

The better you develop Goal 2, working ON the business and what is IMPORTANT but not urgent, the more you will succeed in Goal 1.

	URGENT Goal 1	NOT URGENT Goal 2
IMPORTANT	<ul style="list-style-type: none"> • Income • Profit • New Customers • WOW Service • Paying Bills 	<ul style="list-style-type: none"> • Mission • Values • Completed Outcomes • Professional Training, Coaching, practice. • Planning • Communication
NOT IMPORTANT	<ul style="list-style-type: none"> • Telemarketing calls. • Most operations during work. • Fretting over minor errors. 	<ul style="list-style-type: none"> • Gossip. • Social media. • Non-emergency texts, calls. • Personal issues from day before.

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Assignment

Goal 3 – Higher Goals for Office
 Vision – Values, Purpose, Mission


Goal 1 – Production Goals
 Full Capacity goals for each doctor, provider, and major service (decompression).
 Monthly goals for November.
 Quality Goals. Patient satisfaction survey, others?
 Complete patient outcome.

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Assignment

Goal 2 – Organizational Goals Next class!!
 (You are about to learn these next few classes)




Monthly G.A.P. /Kaizen – improvement procedure.
 Team training. Hours per month average goal.
 Individual training and coaching. Hours per month average.
 Income per FTE (start tracking)
 Important regulations, backlogs, financial legal issues pending.
 Develop team member job checklists, employment manual
 Stats, graphs
 Marketing department – organization
 Clinic department organization
 Pathways – flows.
 Define COMPLETE patient outcome.

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For reflection...

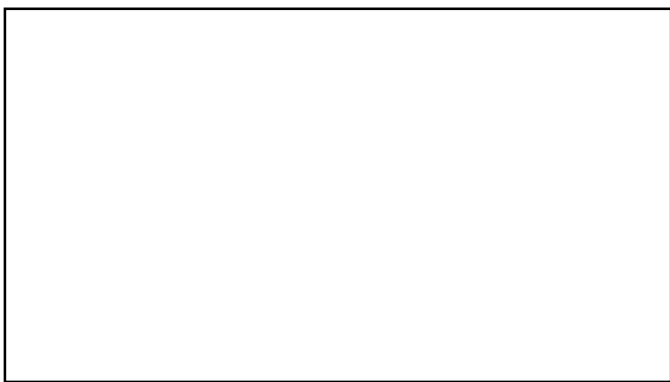


**Attending to symptoms,
 we lose our purpose.**

-Shoma Morita, M.D.

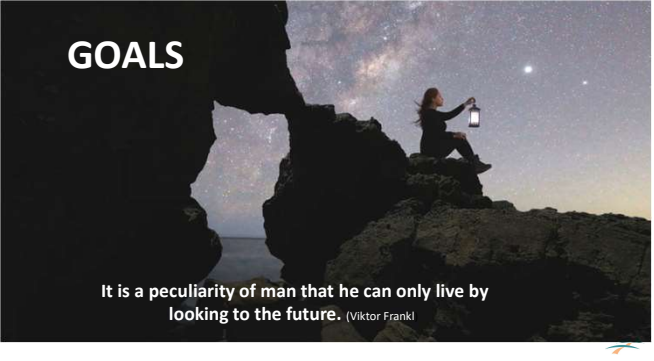
This specific quote appears in various comments, including BrightQuest, which cites it directly without a specific book reference. It is also mentioned in discussions about Morita Therapy, particularly in academic articles and literature that analyze his methods and philosophies.

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46

GOALS



It is a peculiarity of man that he can only live by looking to the future. (Viktor Frankl)

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