

# Goal Driven Business - Progress Grid

Plot Your Progress as you improve each area of your office.



Stage of Development	Business Owner	CEO, Clinic Director	Office Management	Marketing	Team	Front Desk	Doctors	Therapy, Clinical Support	Wellness - Case Management	Billing-Patient Accounts
<b>5.</b> 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 that is 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!	Effective marketing procedures routinely implemented creating lots of new patients and returning patients. Waiting list. Happy Patients!	A team that works together to achieve mission. Synergy high. Extreme ownership and responsibility. Enjoy helping each other to manage office and 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 patients!	Excellent clinical services provided to patients in order to support doctor's care. Educating Patients. Happy Patients	Patients completing treatment programs, happily doing well on a wellness program. Happy Patients!	Zero Balances, patients understanding and agreeing to financial terms. Patients sticking with care. Happy Patients!
<b>4.</b> Maturing. 50-70% capacity.										
<b>3.</b> Stable Growth 35-55% capacity.										
<b>2.</b> Unstable Growth, but solvent.										
<b>1.</b> Beginning Growth or Re-growth.	Not solvent, not legal. At unnecessary risk.	Dr. & team not motivated. Working just for a job and \$ No or inconsistent direction & plan	Disorganized. No regular improvement program. Polices procds not followed	No or little marketing procedures. No on in charge. Not enough NPs or ROPs	Low purpose, robotic, low initiative, disengaged, dog eat dog.	Appt book spotty or empty. Not ensuring patients come in.	Doctors bored, uncaring, not focused. Pts not happy. Mediocre 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.
Date/Grade	Eg., 3.5 Feb, 2013									