

Study and Assignment Guide

Week 3 Class 3 PRACTICE GOALS AND ANALYTICS

A. Goals. Goals are agreements of where you want to go.

- ___ 1. What is the difference between Goal 1 for a patient, and Goal 2. How could you help your patients achieve both goals better?
- ___ 2. By working on Goal 2 for your office, how could that improve office visits and collections?
- ___ 3. Why is it important to stay connected to both the practice's higher goals (Goal 3), and yours?
- ___ 4. Define the goals for your practice. Complete this section by November 1.

If your office already has some or all of the following goals established, take time to review them personally, and then discuss with your clinic director. If OK with your clinic director, do the same with your team. Make suggestions to update any if needed and do so if agreed upon.

If this is all new to your practice, take your time over the next several weeks to work with your Clinic Director and team, and us as well, to at least define these goals on a

- Mission
- Core Values
- Complete Valuable Outcome
- Full Capacity Goals
- November Goals for NPs, Visits, Collections

- ___ 5. Optional supplemental videos on mission, your Why, and core values. Encourage your clinic director to watch and consider sharing with your team.

- **The Golden Circle: Begin with Why. Simon Sinek**

<https://www.youtube.com/watch?v=Jeg3lIK8lro> (5 minutes)

<https://www.youtube.com/watch?v=qp0HIF3Sfi4> (18 minute version)

- **Core Values by Tony Hsieh**

<https://www.youtube.com/watch?v=AbFIPc34AJ8> (8 minutes)

- ___ 6. Optional Reading. The Goal Driven Business.

- Chapter 2. The Synergy of Three Goals. Page 19-33
- Big Shift #9 Formulate New Goals Page 118 -126

B. Statistics (due Tues, October 17)

- ___ 1. Data collection:
 - a. If your statistical reporting system is set up, please review it and see how it might be improved.
 - b. If it is not set up, contact Linda to help you establish a simple procedure to capture and display practice numbers for better managing your practice.
- ___ 2. Review the monthly trends of your office visits over the last 1-2 years. What do you notice?
- ___ 3. Over the last six months, is the trend downward, upward, or about the same.
- ___ 4. What percentage is your visit volume relative to full capacity. For example, if your office is capable of seeing an average 800 visits per month, and you are seeing 400 visits, you would be at about 50% capacity.,
- ___ 5. What is your Patient Visit Average, or Patient Retention, for this year? How could it be improved.
- ___ 6. What is your collection per visit?
- ___ 7. What has been the trend of your new patients for the last 3 months?

C. Capstone presentation

Let's discuss it! Linda will set up a time for you and Ed to review your plans and progress at your convenience. Due by November 13.

The Capstone Project is your BIG practice development assignment for this program. The goal of this assignment is to demonstrate your understanding of the information presented during this course by presenting a practical and specific plan that would significantly improve your practice. (See info sheet explaining it, found on your Resources page.)

D. Read the *Goal Driven Principles* and consider how they apply to your office.

- ___ 1. Principle #3 - Goals
- ___ 2. Principle #4 – Self-Determinism and Drive
- ___ 3. Principle #5 – Reality – Confronting the Brutal Facts

E. Individual Share Sessions. Complete at least one individual share session this week.

Done! ___ With whom? _____

F. Clinic Director Briefing

Explain (teach) your clinic director in your own words the topics you covered in your answers above and anything else covered in this first class.

Answer and Worksheet

Week 3 Class #3 PRACTICE GOALS AND ANALYTICS

Please write (legibly please) your answers or what you did for the assignments in Class #3. Have your clinic Director sign below and fax or email us when completed. Try to get it back to us by Tuesday before the next class.

Thank YOU!

Fax: 1(877) 868-0909 Email: Services@GoalDriven.com

A. GOALS

- ___1. What is the difference between Goal 1 for a patient, and Goal 2.

- ___2. How could you help your patients achieve both goals better?

- ___3. How by working on Goal 2 for your office could that improve office visits and collections?

- ___4. Why is it important to stay connected to both the practice's higher goals (Goal 3), and yours?

- ___5. Define and review practice goals by November 1. Please send a copy to the above address.

B. Statistics (due Tues, October 17).

- ___1. Data collection:
 - a. If your statistical reporting system is set up, please review it and see how it might be improved.
 - b. If it is not set up, contact Linda to help you establish a simple procedure to capture and display practice numbers for better managing your practice.
- ___2. Review the monthly trends of your office visits over the last 1-2 years. What do you notice?

- ___3. Over the last six months, is the trend downward, upward, or about the same.
- ___4. What percentage is your visit volume relative to full capacity. For example, if your office is capable of seeing an average 800 visits per month, and you are seeing 400 visits, you would be at about 50% capacity.,
- ___5. What is your Patient Visit Average, or Patient Retention, for this year? How could it be improved.
- ___6. What is your collection per visit?
- ___7. What has been the trend of your new patients for the last 3 months?

C. Capstone presentation

Call scheduled with Ed on _____ Completed on _____

D. Read the *Goal Driven Principles* and consider how they apply to your office.

- a. Principle #3 – Goals _ Done _____
- b. Principle #4 – Self-Determinism and Drive Done _____
- c. Principle #5 – Reality – Confronting the Brutal Facts Done _____

E. Individual Share Sessions. Complete at least one individual share session this week.

Done! ___ With whom? _____

F. Clinic Director Briefing

Explain (teach) your clinic director in your own words the topics you covered in your answers above and anything else covered in this first class.

Yep! Our manager did a great job briefing me on the material she learned and how to use it.

Student Name: _____ Clinic Director: Initial/signed: _____