



## GOAL DRIVEN **Practice Management Training Program for Chiropractic Offices**

*A Practical* MBA for  
Chiropractic Business  
Owners and Their  
Managers

## **Program Curriculum**

(Updated 5/1/2023)

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## Practice Management Training Introduction

There are three phases to this program:

1. Production and Exchange
2. Strengthen and Improve
3. Integrate and Lead

The basics of business are always production and marketing. But to sustain and increase production, the business must constantly improve and become stronger. Finally, it needs something more - happy team members, meaningful work, and a purpose to achieve.

The training covers fourteen subjects with in-office assignments, all taught live via Zoom. The program lasts 11 weeks.

This training does not cover how to bill insurance, set up retirement plans, how to work out lease arrangements, buy real estate, or analyze tax or legal issues. Nor does it cover patient scripting for the doctor or the front desk. While these subjects are part of practice operations, they don't make the critical difference in whether the office achieves its goals in the long run.

We have seen all kinds of different practice procedures that are effective. But in the end, what counts the most in a practice's success is how well it is managed and led.

As Gallup proclaimed in its recently published bestselling book titled, *It's The Manager*: "Based on our largest global study of the Future of Work, Gallup finds that the quality of managers and team leaders is the single biggest factor in your organization's long-term success."

Management has its own procedures, just like any other function in a business. And it is the absence of these procedures that limits the profits and ultimate success of any practice.

Therefore, we will focus on the fundamental principles of practice development, and our training will cover management procedures, including leadership, marketing, and constant improvement.

*"Every man lives by exchanging."*

— Adam Smith (1776)

## 1. Produce and Exchange

### (Week 1) Marketing and Production

Producing and exchanging are the bedrock of any business.

This lesson teaches 8 fundamentals of business that never go away. This is the boot camp for the course.

This subject comes first as it is the most basic to any business and one that many employees do not fully appreciate. As a friend of mine once said, "Everyone is on commission, but most don't know it." In other words, our employment and our pay are determined by what we produce.

Every single action taken, and every patient encounter determines the success of the practice. Each moment contributes to positive outcomes for the patients and business, or it doesn't. There is no in-between.

Fundamental marketing tactics and attitudes will be covered, as well as procedures to provide extraordinary service.

This course sets the standard necessary for success. Businesses require commitment, a sense of ownership and responsibility, and a focus on goals. Anything less will jeopardize the success of the business and your career.

Learn these points, and you can survive and maybe thrive. Don't learn or apply them and your business and career will falter and possibly fail.

## (Week 2) Evolution of a Practice and the Key Duties of the CEO and Practice Manager.

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.

CEO/Manager: Learn the essential goals and duties of the doctor as the Chief Manager, or CEO, and of the practice manager. As the CEO, most of the duties will eventually be delegated to the practice manager.

- Why these roles are pivotal in managing growth, increasing capacity, and improving income.
- Top 10 Duties of the CEO/Clinic Director
- Top 10 Duties of the Practice Manager
- How the two roles work together to create a Goal Driven Business

## (Week 3) Practice Goals and Goal Driven Analytics

**Goals.** Learn how to determine the most practical and meaningful goals for your practice that *everyone wants to achieve*.

Goals underlie every action we take. They can motivate and direct us and help us work together in harmony. But the subject of goals can be confusing, and the process of goal setting can be ineffective. This course will show you how to do it right.

**Goal-Driven Analytics.** Learn how to determine your business's performance by tracking the Key Performance Indicators, especially statistics. These are predictive, so you can know what to work on for the most significant improvement.

We will look at all aspects of the statistics, including specific stats for different departments.

## (Week 4) Break: Review & Prepare. Share session.

*“The aim of leadership should be to improve the performance of man and machine, to improve quality, to increase output, and simultaneously to bring pride of workmanship to people.”  
(W. Edwards Deming, Out of the Crisis)*

## 2. Strengthen and Improve

### (Week 5) The Practice Improvement Process and Improving Team Performance

The Japanese call it Kaizen. It is a process of constant improvement and drove the Japanese economy forward in the late 20<sup>th</sup> Century, stimulating American manufacturing to apply the same methods to stay competitive. Our process for practices is called the Goal Driven System.

If you are not constantly improving, your patients will go to a clinic that is.

But there are barriers, many of which are hidden, that keep you from improving your practice. We will reveal 4 of them and how to defeat them. We will also look at the tools you need to implement the Goal Driven System of practice development.

- Improving Patient flow and improving service.
- Bottlenecks, the theory of constraints, and how to find them.
- The “Revenue Cycle.”
- Pareto Principle and how to add more time to work on your business.
- Parkinson's law of time.
- Edwards Deming, Kaizen and the goals achievement process
- Your practice development map: the stages in developing your business.
- The 5 engines that drive your business to its goals.
- The 20 big shifts you will need to make to achieve your goals.
- Training and planning meetings that are short, effective, and engaging for all, including:
  - Case management
  - Marketing
  - Support staff
  - Doctors and Providers

## (Week 6) Improving Individual Performance

### Job checklists versus job descriptions

- Why a job checklist is better
- How to make and use a job checklist

### Improving your people through Goal Driven

- Hiring
- Training
- The Coaching Review
- Job checklists
- Career planning
- Personal planning
- The Benefit Review
- Specialists and Team member roles
- How to keep the employee engaged
- Bonus systems
- What employees really want

\*\*Special attention will be put on the skills and procedures for different clinic areas, such as the front desk, patient accounts, therapists, and associates.

## (Week 7) The Marketing Manager System

This system has worked over 20 years to grow practices and take them out of the ups and down of the practice roller coaster. You will learn how to create an effective marketing department that fills your practice.

Marketing Coordinator and Marketing Assistant Job Checklist.

How to set up an efficient marketing department.

Marketing Strategies, budgets, stats, expected ROI.

Checklists for:

- Routine internal marketing procedures
- Special Promotions – types, planning, how to do them.
- Patient Education Programs
- Community Education Program
- External alliances
- External events
- Advertising Internet, signs, radio, other
- Public relations



## (Week 8) CEO Practice Manager – Advanced duties and managing different departments.

This section is a more advanced study of the roles of the CEO and the Manager. Learn the *Fast Flow CEO System*, Service Leadership, and Service Management, and how *to work as a management team*.

Review how the CEO helps set the goals with the group and for each individual and adds insistence without threats.

Review how the manager works with the CEO, individuals, and the team to make regular performance improvements as indicated by the statistics.

"Cleaning or clearing the CEO desk."

Learn how to best manage (improve) different departments and common situations they experience:

- Front Desk
- Billing and Collections, the "revenue cycle."
- Doctor patient communication and encounters
- Associates
- Allied Providers

## (Week 9) Break: Review and Share Session

*"SEAL team soldiers have a leader but are really self-managed as they have all bought into the mission, know what their individual job is, and know the other's job as well. If the leader is disabled, any of the others can take over. ... A familial company like ours runs on trust rather than on authoritarian rule." (Yvonne Chouinard, Let My People Go Surfing)*

## 3. Integrate and Lead

### (Week 10) Personal Power and Total Team Leadership

All prior lessons to this section which teaches how to create a Goal Driven team that has fun working together to achieve the goals of the office.

You will learn how to develop your authentic power and help others to do the same. Integrity is fun and inspires trust; you will learn simple procedures to bring this about.

We will dig into a deeper understanding of the goals of your business and how your professional and personal goals align with them to create a more productive work-life experience.

Leadership is teaching, and teaching is leading. We will learn how to teach and cooperatively coach each other to create a team that can accept ownership for goal achievement. We will review five procedures to help team members and the team continue developing their leadership skills and motivation to lead the office and create a Goal Driven Business.

*To teach is to lead.* The last week you will teach.

### (Week 11) Student Presentations, Graduation Party

Each student will be required to give a five-to-ten-minute presentation on how they and their doctor plan to develop a more profitable practice that provides better service and where it is more enjoyable to work.

# GOAL DRIVEN

MORE PROFIT - BETTER SERVICE - GREATER FREEDOM