



Progress Grid

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

**GOAL 3 –
Your Greater Purposes**



Stage of Development	CEO, Leadership	Marketing	Front Desk	Doctors	Therapy, Clinical Support	Wellness - Case Management	Billing-Patient Accounts	Office Management	Business Admin	Team
5. At or close to capacity. ----- Clinic runs smoothly as a team, is happy, and requires little daily management	<ul style="list-style-type: none"> Dr. and team focused on higher purposes. Long term consistent plan. Motivated & motivating others. Goal setting and constant improvement. 	Effective marketing procedures routinely implemented creating lots of new patients and returning patients. 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 patients!	Excellent clinical services provided to patients in order to support doctor's care. Educating Patients. Happy Pts.	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!	Efficient, organized, competent productive group – following procedures in Practice Playbook, constant training. Happy Patients!	A solvent, viable, business In compliance. Risk free. (Taxes, compliances, insurance, legal etc.)	A team that works together to achieve mission. Synergy high. Fun 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.	Dr. & team not motivated. Working just for a job and \$ No or inconsistent direction & plan.	No promotions, networking, or patient education.	Appt book spotty or empty. Paper before patients.	Doctors bored, uncaring, not focused.	Therapy bored, not caring, not educating, slow.	Patients leaving prematurely.	Patients leaving due to finances, money not collected.	Disorganized, no ongoing improvement program.	Not solvent, not legal.	Low purpose, robotic, low initiative, dog eat dog.
Date/Grade	Eg., 3.5 Feb, 2013									

[Goal 2]

[Goal 1]