

DR. _____ 'S OFFICE'S



B I G Y E A R

game plan

CLARIFYING DOCTOR'S ROLE

1. Check your primary desired role: _____

- CEO** **Treating Doctor** **Clinical Director**

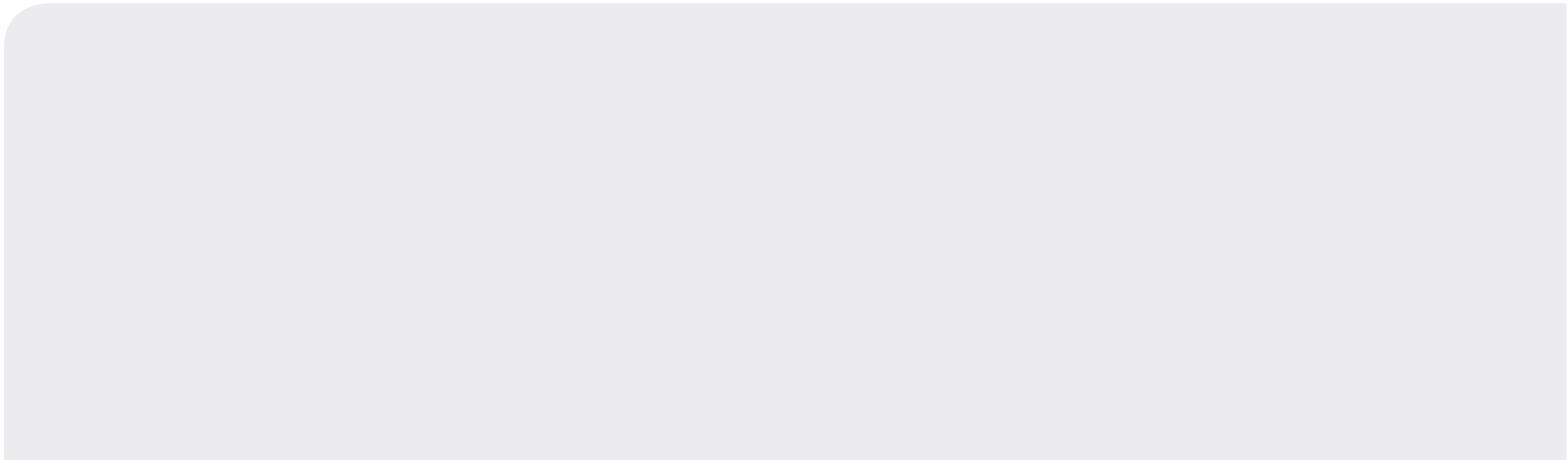
2. What is the number of treatment days per week you are planning for 2017? _____ 2018? _____ 2019? _____

3. What is your desired number of Associates by June 30, 2017? _____
June 30, 2018? _____ June 30, 2019? _____

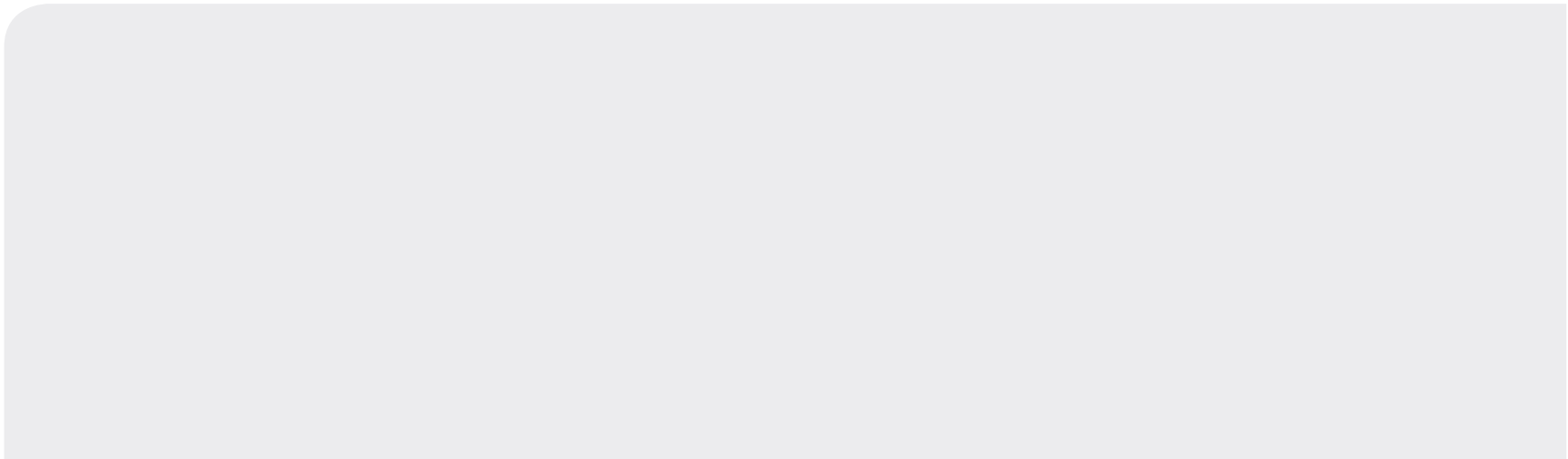
4. Should you be running the leadership team or should someone else? **You** **Someone else**

5. How much time are you spending coaching Associate doctors per week? _____ per month? _____

6. What are your other desired outcomes/changes?



7. Our New Game Plan...



2006 Collections (10 Years ago)	2016 Collections (Last Year)	% of Growth (over the last 10 years)
\$	\$	%

COLLECTION GOALS

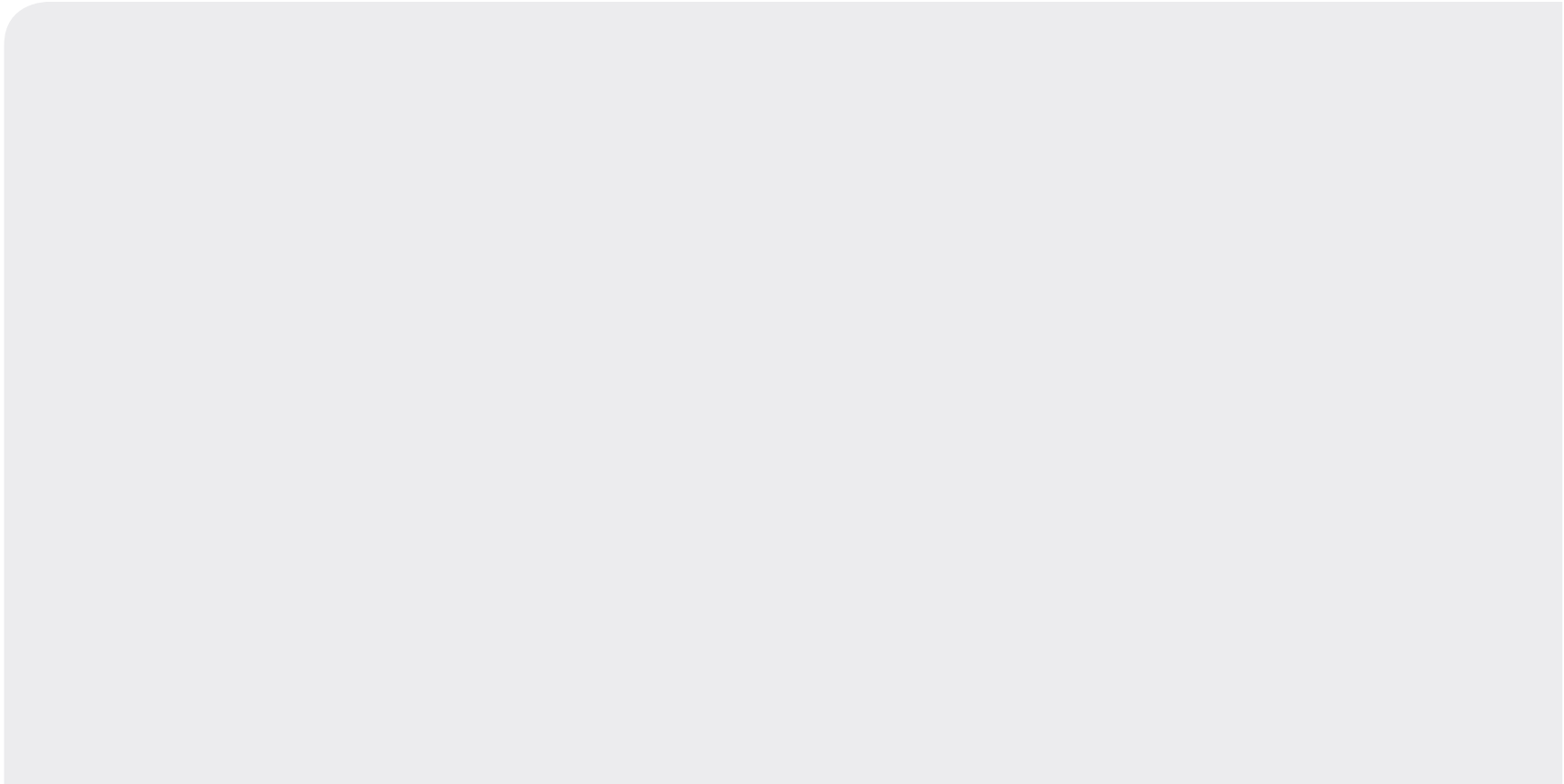
	Draft	Final
2026 Collections (10 YEAR GOAL)	\$	\$
2019 Collections (3 YEAR GOAL)	\$	\$
2017 Collections (1 YEAR GOAL)	\$	\$

COLLECTIONS

2026	\$
2025	\$
2024	\$
2023	\$
2022	\$
2021	\$
2020	\$
2019	\$
2018	\$
2017	\$
2016	\$

IS THIS A **REAL**
5X GOAL?

OUR 2017 **B I G** **Y E A R** GOAL IS...



BREAKING DOWN YOUR BIG YEAR GOAL

insert your number

	ANNUAL COLLECTION GOAL	÷	AVERAGE REVENUE PER NEW PATIENT	=	# OF NEW PATIENTS NEEDED
NEXT YEAR		÷		=	
EXAMPLE	\$ 3,000,000	÷	\$ 3,400	=	883

Let's break it down...

	# OF NEW PATIENTS NEEDED	÷ 12	=	MONTHLY NEW PATIENT GOAL
NEXT YEAR		÷ 12	=	
EXAMPLE	883	÷ 12	=	74 New Patients per month

Determine your monthly marketing investment needed to reach your new goal...

insert your number

	MONTHLY NEW PATIENT GOAL	x	ACQUISITION COST PER NEW PATIENT	=	MONTHLY MARKETING INVESTMENT
NEXT YEAR		x		=	
EXAMPLE	74	x	\$ 123.29	=	\$ 9,123.46

COMPLETE **YOUR TOP 10** LIST OF SPECIFIC GROWTH STRATEGIES FOR YOUR PRACTICE THAT YOU ARE CURRENTLY EXECUTING



1

2

3

4

5

6

7

8

9

10



10 5X GROWTH STRATEGIES YOU CAN USE IN THE BIG YEAR

1

2

3

4

5

6

7

8

9

10



TALENT FINDER: LIST THE TOP 5-15 TEAM MEMBERS

Name	Available Opportunity
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

11

12

13

14

15

What best describes the coaching experience for your team?

A large, empty rectangular box with rounded corners, intended for a text response to the question above.



HOW DO YOU PLAN TO COACH YOUR TALENT?

1

2

3

4

5

PROJECTIONS BY REVENUE SOURCE

Source of Revenue	2016 Revenue (\$)	2017 <i>Projected</i> Revenue (\$)	2019 <i>Projected</i> Revenue (\$)	2026 <i>Projected</i> Revenue (\$)

THE MASTER STATISTIC FINDER

ADD ANY OTHER THAT YOU HAVE

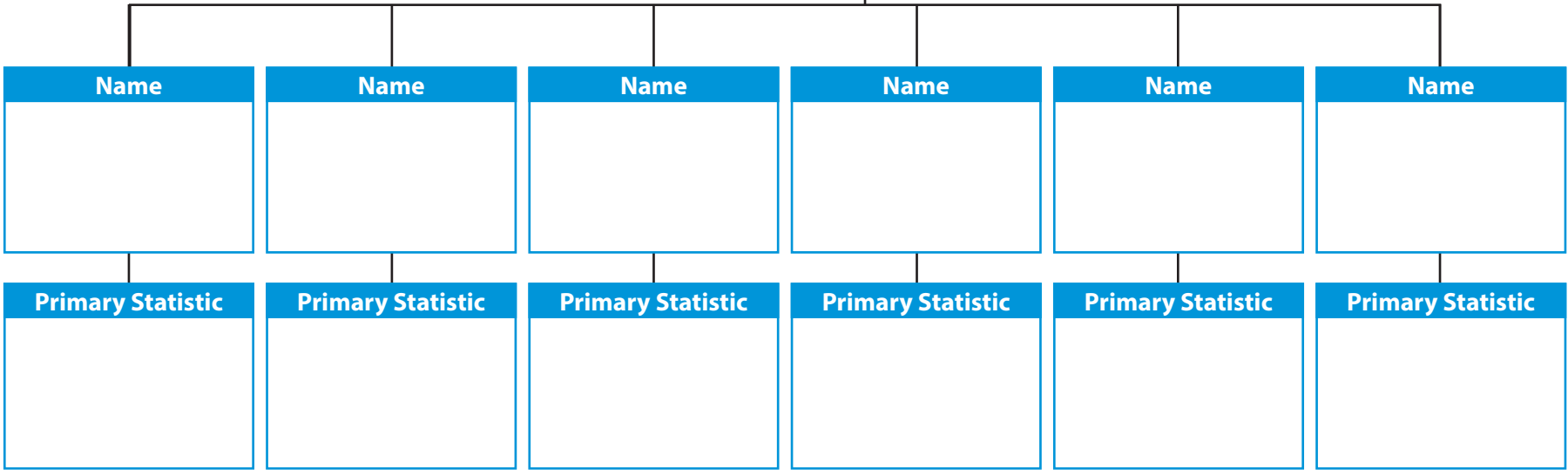


Statistic	Who Owns
New Patients	
Patient Referrals	
Front Desk Collections	
Insurance Collections	
Hygiene Collections	
Doctor Production	
Average Revenue/NP	
% of Profit/Margin	
Total Collections	
Associate Production	
Acquisition Cost/NP	
Marketing Spend	
Patient Satisfaction	

Statistic	Who Owns

LEADERSHIP ORGANIZATIONAL CHART

Doctor



of Team Members _____

What new capacities must be added?

What re-assignments need to be conducted?

UNREALIZED REVENUE =

CALCULATE YOUR UNREALIZED REVENUE:

Current Annual Revenue/Collections	Per Room Per Month Target
\$ 2 Million	\$ 39,000
÷ 12 =	X
Monthly Revenue	2017 # of Treatment Rooms
\$ 166,667	10
÷	=
Current # of Treatment Rooms	Monthly Revenue
10	\$ 390,000
=	x 12 =
Revenue per room/mo.	Maximum Revenue
\$ 16,667	\$ 4.68 Million
	-
	Current Revenue
	\$ 2 Million
	=
	Unrealized Revenue
	\$ 2.68 Million

Expenditures that result in recouping the cost AND growing the business are investments = **PROTECTING PROFITS!**

Expenses and debts that do NOT grow the business negatively impact cash flow = **REDUCED MARGIN!**

MAXIMUM REVENUE
(no added S&E)

\$ 4.68 Million

CURRENT REVENUE

\$ 2 Million

UNREALIZED REVENUE =

Maximum Revenue \$ 4.68 Million
Current Revenue - \$ 2 Million

\$ 2.68 Million
\$ 223,333/mo.

UNREALIZED REVENUE =

CALCULATE YOUR UNREALIZED REVENUE:

Current Annual Revenue/Collections		Per Room Per Month Target	
÷ 12 =		X	
Monthly Revenue		2017 # of Treatment Rooms	
÷		=	
Current # of Treatment Rooms		Monthly Revenue	
=		x 12 =	
Revenue per room/mo.		Maximum Revenue	
		-	
		Current Revenue	
		=	
		Unrealized Revenue	

Expenditures that result in recouping the cost AND growing the business are investments = **PROTECTING PROFITS!**

MAXIMUM REVENUE
(no added S&E)

\$ 4.68 Million

Expenses and debts that do NOT grow the business negatively impact cash flow = **REDUCED MARGIN!**

CURRENT REVENUE

\$ 2 Million

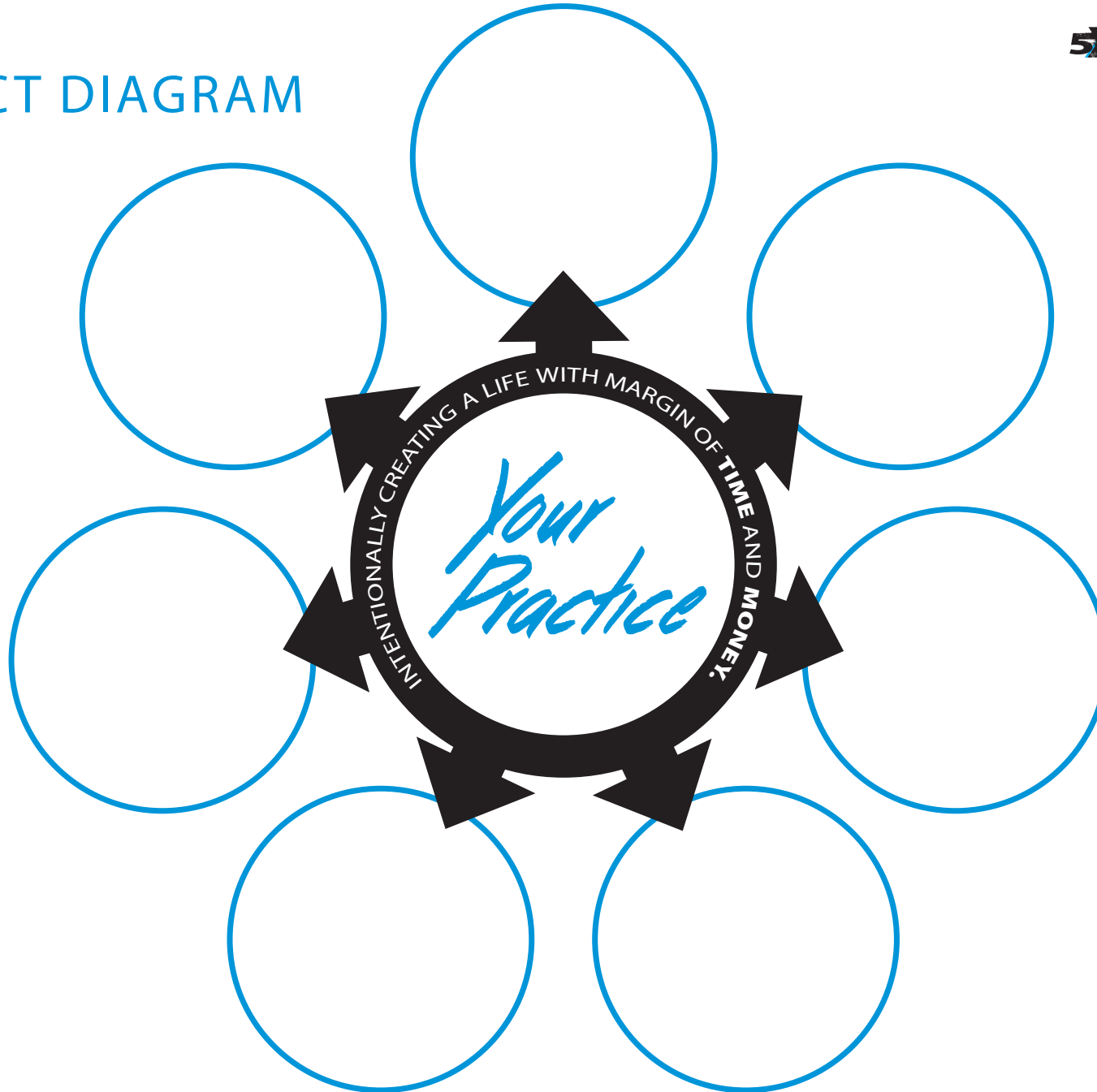
UNREALIZED REVENUE =

Maximum Revenue \$ 4.68 Million

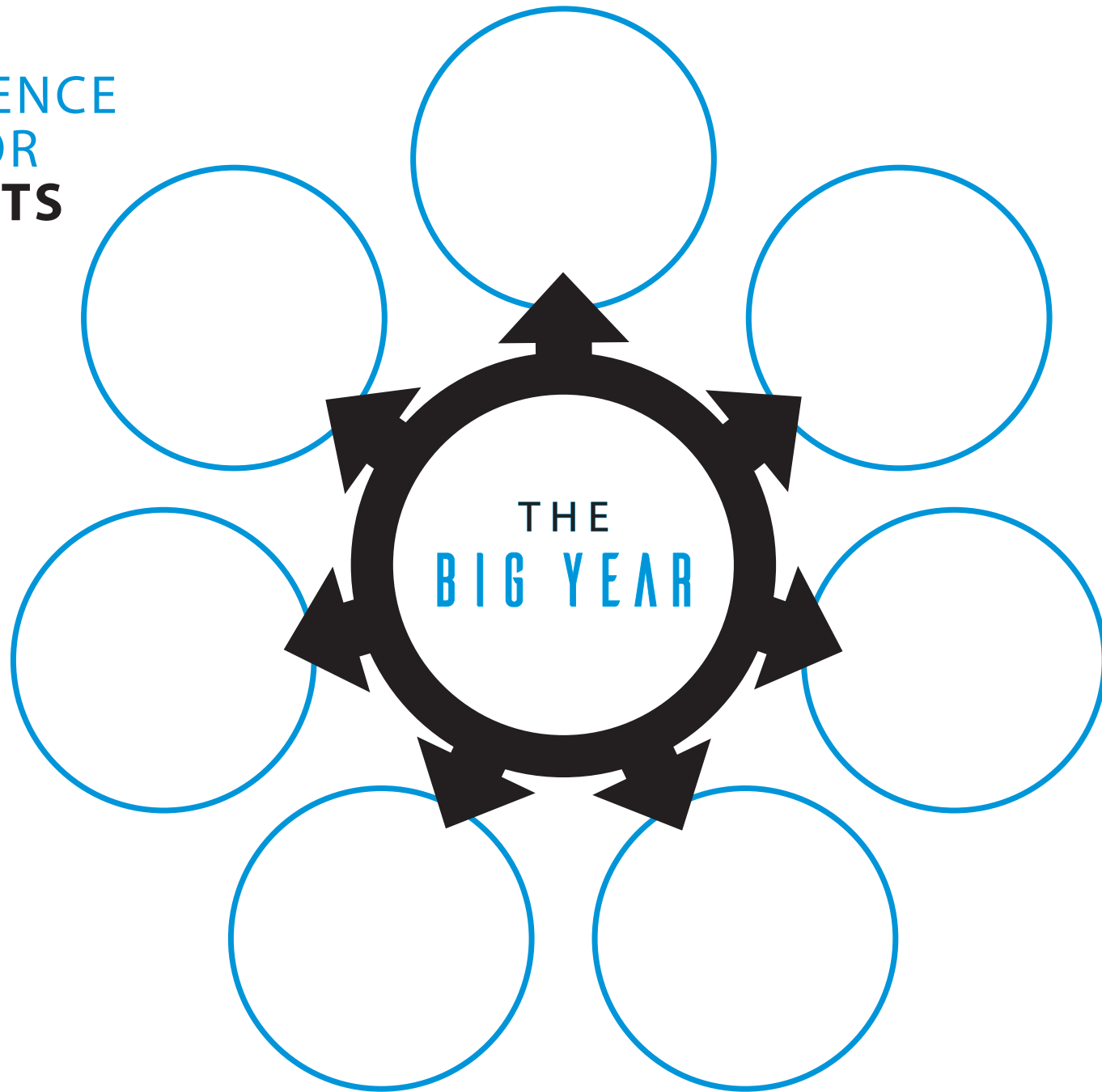
Current Revenue - \$ 2 Million

\$ 2.68 Million
\$ 223,333/mo.

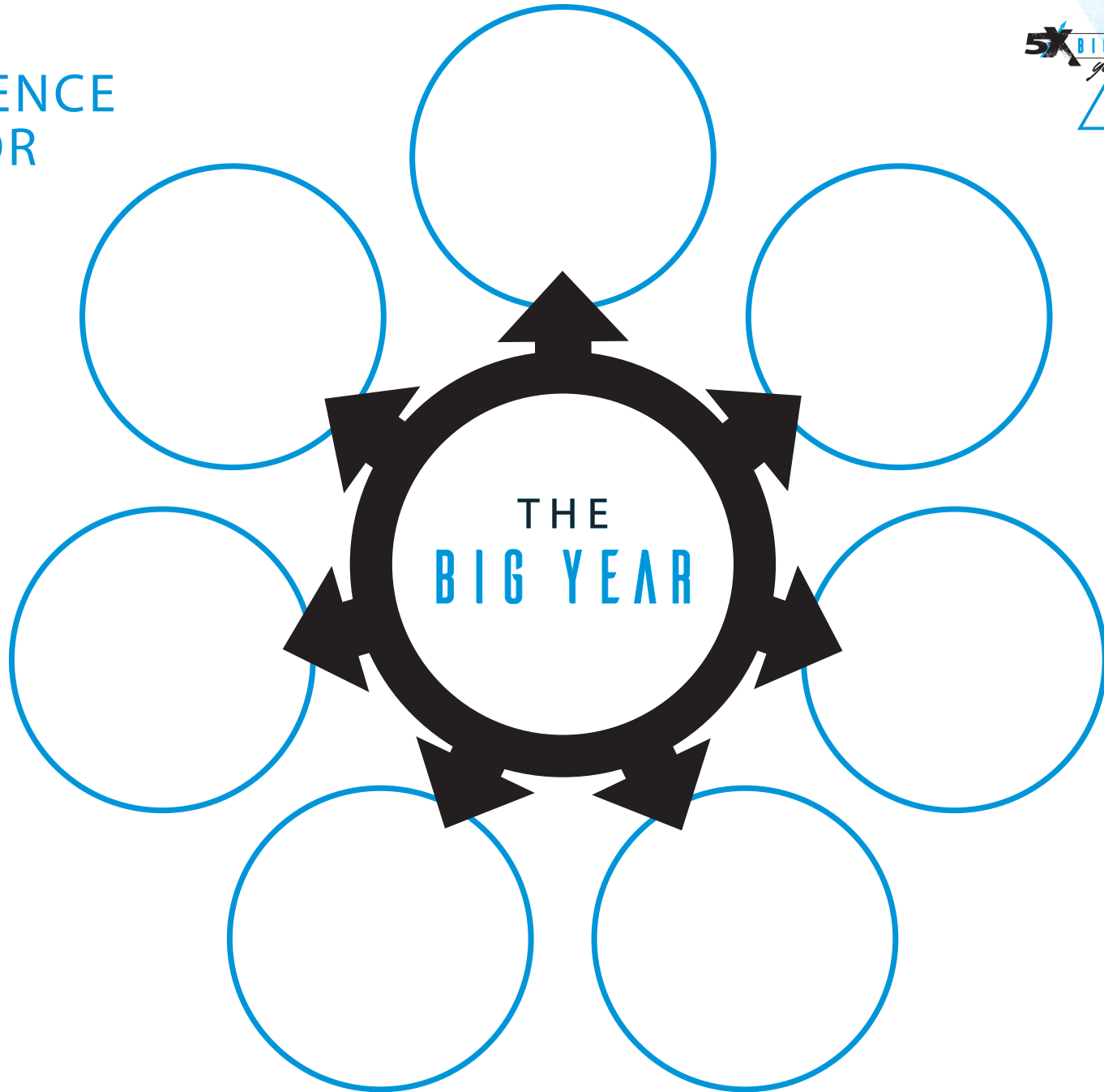
IMPACT DIAGRAM



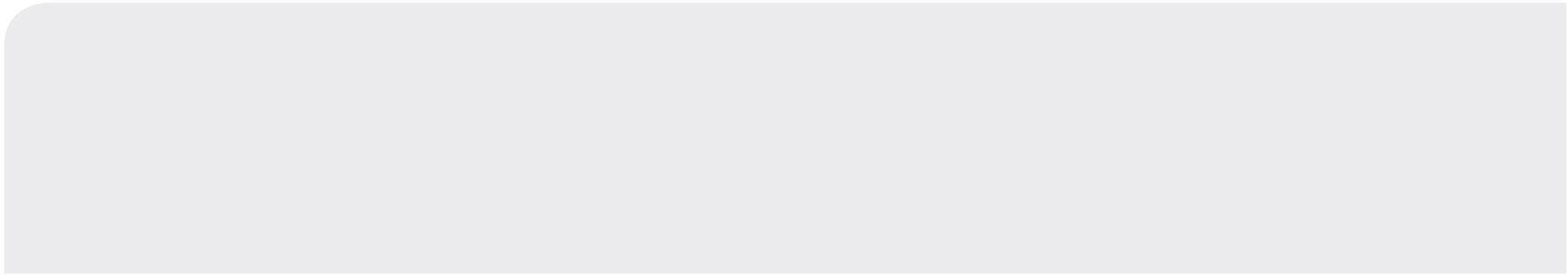
EXPERIENCE
CREATOR
PATIENTS



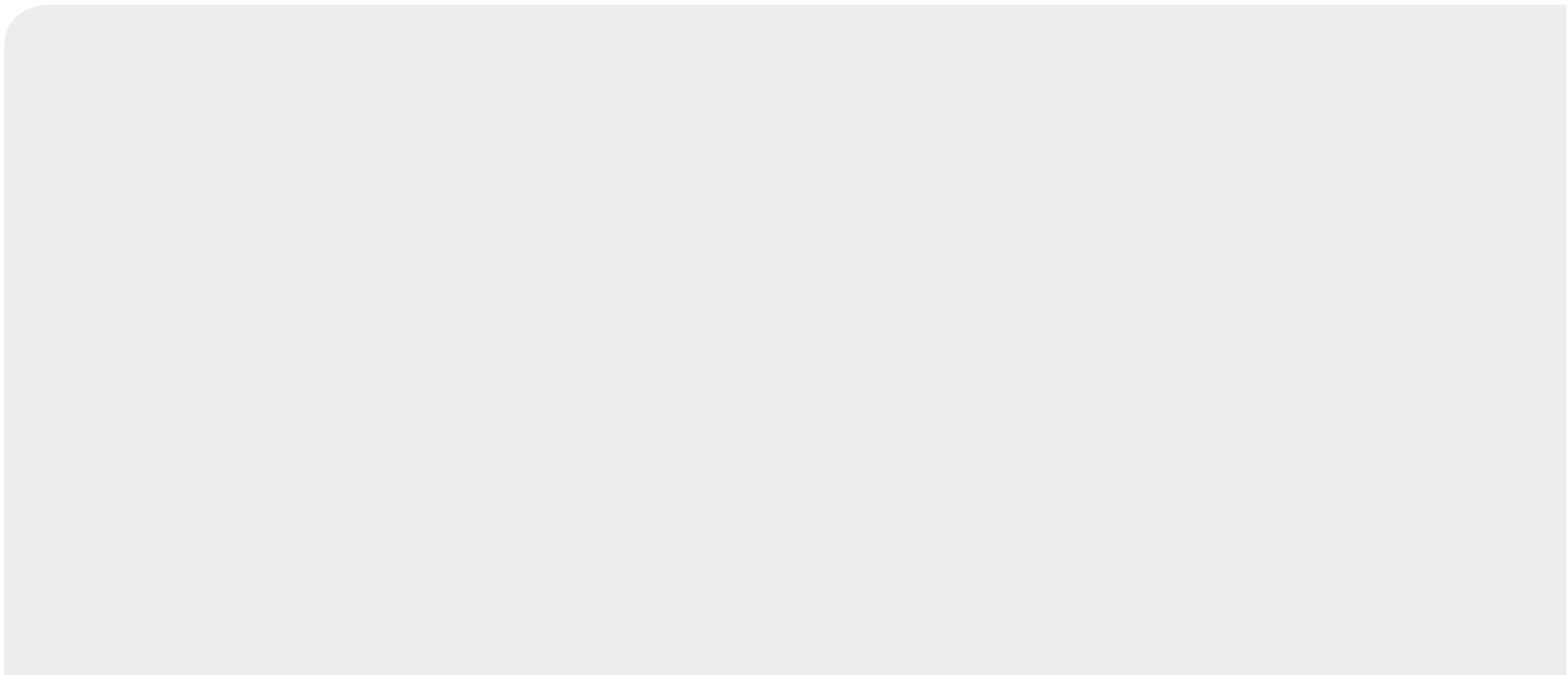
EXPERIENCE
CREATOR
TEAM



PURPOSE STATEMENT



CORE VALUES



Q1 COMPANY ROCKS

Rock	Who
1	
2	
3	
4	
5	
6	

Q1 LEADER ROCKS

Name	
------	--

1

2

3

4

Name	
------	--

1

2

3

4

Name	
------	--

1

2

3

4

Name	
------	--

1

2

3

4



Q1 LEADER ROCKS

Name	
------	--

1	
---	--

2	
---	--

3	
---	--

4	
---	--

Name	
------	--

1	
---	--

2	
---	--

3	
---	--

4	
---	--

Name	
------	--

1	
---	--

2	
---	--

3	
---	--

4	
---	--

Name	
------	--

1	
---	--

2	
---	--

3	
---	--

4	
---	--

PRIMARY MARKETING STRATEGY

-

-

-

-

-

NEW CAPABILITIES NEEDED

1

2

3

4

5

I pledge to fully commit to putting my energy, effort and creativity into the Big Year. I will always strive to live up to my potential and do the best in all situations. I AM COMMITTED TO OUR...

5X BIG YEAR *game plan*

name

signature

name

signature

name

signature

name

signature

name

signature

name

signature

name

signature

name

signature

name

signature

name

signature

ISSUES LIST

Throughout the event if there is an issue that arises that needs to be handled at some point by the team, put it here so that your team can be sure to handle it when the time is right.

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18



ACTION ITEMS LIST

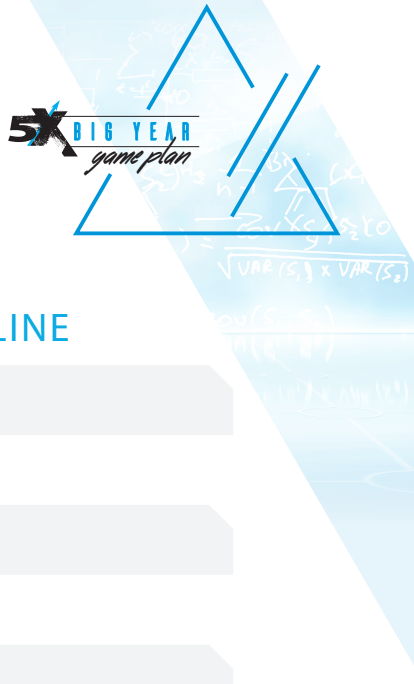
Put any to do items that come out of this meeting here to hold the team accountable.

ACTION ITEMS	WHO'S RESPONSIBLE?	DEADLINE

ACTION ITEMS

WHO'S RESPONSIBLE?

DEADLINE



ACTION ITEMS LIST

Put any to do items that come out of this meeting here to hold the team accountable.

ACTION ITEMS	WHO'S RESPONSIBLE?	DEADLINE

The background features a light blue and white geometric pattern of overlapping triangles and lines. Faint mathematical formulas are visible in the upper right, including $\sqrt{\text{VAR}(S_1) \times \text{VAR}(S_2)}$, $\text{COV}(S_1, S_2)$, and $\frac{\text{COV}(S_1, S_2)}{\sqrt{\text{VAR}(S_1) \times \text{VAR}(S_2)}}$.

5X BIG YEAR
game plan

14550

© 2017 Scheduling Institute. All rights reserved.
(p) 866.956.2513 (f) 866.651.6445
www.schedulinginstitute.com

