

Team Accountability - Outline & Script

Assign one or more Focuses to each individual, who then follows a pre-determined strategy, tracks progress, and reports results. These results are reported at various meetings from the preceding time period (i.e., quarterly result at the Quarterly Meeting) in the form of a "Success Rate."

Focus: Specific areas of a practice that are used to measure Success Rates, i.e.:

- **New Patients**
- **Patients Visits**
- **Conversion Rates (Report of Findings and Care Plan Renewals)**
- **Revenue**

Success Rate: The percentage of success as it relates to a specific goal.

Use the steps below to manage team members:

For Success Rates at or above 100%:

1. Praise the individual responsible for the results, along with entire team for contributing.
2. Review written Action Steps carefully and confirm that each one applies to Practice goals.
3. Do not attempt to make any major changes to successful Action Steps.
4. When a Success Rate increases, review the action steps carefully that led to the increase and do not abandon them; continue as before.
5. If a Success Rate deviates downward, quickly find out why and solve it with new action steps.

For Success Rates below 100%:

1. Meet with the responsible individual and confirm they are aware of the result.
2. Review written Action Steps carefully and change them to fit a new plan of operation.
3. Always compare with Action Steps in the category of Revenue.
4. Obtain a firm commitment from the individual who is responsible, to follow through with Action Steps and keep accurate results on Success Rate reports.
5. If Success Rates remain below 100%, there are only two solutions:
 - a. Adjust the goal, so acceptable Success Rates are achievable.
 - b. Issue a warning that requires the responsible individual to perform differently. *

PDC meets with individuals to confirm their commitment to Practice goals and offer support. The bi-annual Performance Evaluation (*Module 2, Week 8*) is important to obtain feedback, plan for progress, review assigned Focuses, and ensure the individual is able to utilize their talents.

*If a team-member is not achieving the intended goals, the team works together to design a new strategy, and then hold the individual accountable for using the agreed-upon system and reaching the goal. If the individual fails to perform, termination of employment may be required. If termination of employment is required, do not delay or the morale of the entire team will suffer!

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This conversation is conducted by the PDC with each individual CA, at least once per quarter throughout the year to obtain feedback and maintain progress towards Practice goals.

PDC

CA

What has this year been like for you in terms of job satisfaction, job duties, stress, progress, etc.?

I enjoy seeing all the happy patients. My duties keep me busy and there have been times of stress, but I enjoy my work and feel I have made a lot of progress.

If you could pick one area to focus on this year, what would that be, and why?

I'd like to help more of the new patients. I enjoy finding their Primary Concerns because I know after that we can help them become healthier.

That's great. Do you also enjoy setting up patients' care plans after their Report of Findings?

I haven't been trained to complete the Report of Findings yet, but I would enjoy that part of the process.

What goal would give you a strong feeling of accomplishment at the end of this year?

I would feel good about completing the entire New Patient Consultation and Report of Findings for a new patient, and then keeping my Conversion Rates above 80%.

Do you need any help from me in order to reach this goal?

No. I'll continue using the Goals Tracking System to track my progress and have already been studying my scripts. I'll be ready for testing soon.

Great. Our team will work with you closely as you learn the scripts and then test you afterwards. You will be held accountable for these results and I appreciate your help towards achieving our Practice goals.

Thank you – I am excited to learn new things and help more people!