

## Systems for Success

*The 3 reasons why you must systematize your practice & business*

The following is a simple outline of where you should create systems for organization and prioritization, which include processes, procedures, checklists, protocols, and reporting associated with them. Obviously the list below just scratches the surface. Extensive detailed systems and operations manual documentation is the ongoing result we are looking for from this exercise. Start implementing and documenting your systems today.

### MARKETING

- ☐ Feedback
  - ☐ avatar - ideal client details
  - ☐ client feedback forms
  - ☐ net promoter score
- ☐ Promotions
  - ☐ detail documentation
  - ☐ ROI assessment
  - ☐ ideas / innovation
  - ☐ events / projects
- ☐ Advertising
  - ☐ lead generation (website, education, free materials, etc), community contribution, testimonials, online (pay per click), PR, public speaking, radio / TV, promotional materials, print advertising (magazines, etc), word-of-mouth
- ☐ Alliances
  - ☐ key people / organizations
  - ☐ projects
  - ☐ referral tracking
  - ☐ referral follow up
  - ☐ referral rewards
- ☐ Scripting
  - ☐ phone
  - ☐ email templates
  - ☐ sales copy templates

### MONEY

- ☐ Accounting
  - ☐ bookkeeping
  - ☐ review of P&L
  - ☐ review of general ledger
  - ☐ payroll
  - ☐ sales / invoicing
  - ☐ cash handling
  - ☐ accounts receivable
- ☐ Budget
  - ☐ regular review
  - ☐ allocation
  - ☐ forecasting

### MANAGEMENT

- ☐ Organization and documentation
  - ☐ maintain heading toward dream/vision/mission/plan
  - ☐ creation of company operating systems
  - ☐ marketing & client fulfillment
  - ☐ cleaning
  - ☐ daily / weekly tasks
  - ☐ prioritization
- ☐ Measurement
  - ☐ financial
  - ☐ client satisfaction
  - ☐ clinical results
  - ☐ marketing ROI
- ☐ Growth and innovation
  - ☐ recruiting and hiring
  - ☐ meetings
  - ☐ culture
  - ☐ review of measurements

### CRM - CLIENT RELATIONSHIP MANAGEMENT

- ☐ Communications
  - ☐ Q&A
  - ☐ phone scripting
  - ☐ email templates
  - ☐ follow up (type, frequency, amount)
  - ☐ automated email
  - ☐ internal communications
  - ☐ complaints & difficult clients
  - ☐ long term communications
  - ☐ missed appointment / refund policies
- ☐ Service
  - ☐ systems operations
  - ☐ practitioner CRM (tx plans, follow up, etc)
  - ☐ new patient intake
  - ☐ scheduling
  - ☐ order processing
  - ☐ billing & purchasing
  - ☐ introductions
  - ☐ misc services (lending library etc)