

The Elite Practice Manifesto Assessment Scorecard

Date: _____

Score: _____/35

Pillar #1: Foundation

1. We have defined the Mission Statement for our practice.
2. We have defined the Vision Statement for our practice.
3. We have defined our Core Values for our practice.
4. We have posted these foundational principles in a prominent place as well as in the Operations Manual.
5. We have made it an accountability for each team member to commit the foundational principles to memory.
6. We ensure that each team member has committed to living and working by these principles while in the practice.
7. We regularly review the foundational principles to keep them relevant and modify them when they cease to inspire and motivate the team.



Date: _____

Pillar #2: Operational Systemization/SOP's/Operations Manual

Score: _____/35

1. We have created protocol sheets for every "chunk" of tasks performed by each team member (with the assistance of each team member).
2. We have created Accountability Agreements for each position which includes: all tasks from each protocol sheet, all tasks that are shared among the team, the practices Core values, and signatures of each team member, CEO and/or direct supervisor and office manager.
3. We have taken photos of each of the following:
 - Ideal tray set-ups
 - Material and equipment set-ups per procedure
 - Common areas (reception, hallways, lunch room, bath rooms)
 - Storage and supply areas (including drawers)
 - Lab
 - Sterilization room
 - Business offices
4. We have an organizational chart including all team positions. (Note: team members may hold more than one position).
5. We have team performance review forms that are completed and filed in employee personnel files after each review.
6. We have agendas for the following meetings:
 - A. Morning Huddle
 - B. Weekly Growth Meetings
 - C. Weekly Department Lead Meetings
 - D. Quarterly Calibration Meetings
7. We have team performance review forms that are completed and filed in employee personnel files after each review.
 - We have agendas for the following meetings:
 - A. Morning Huddle
 - B. Weekly Growth Meetings
 - C. Weekly Department Lead Meetings
 - D. Quarterly Calibration Meetings

We have a complete Operations Manual with the following contents:

- A. Foundational Principles (Mission, Vision, Core Values, or Culture Statement)
- B. Position Protocol Sheets
- C. Position Accountability Agreements
- D. Department photos in ideal condition
- E. Organizational Chart
- F. Scripts for Lifetime Patient Experience.
- G. Team Performance Review Forms
- H. Meeting Agendas

Date: _____

Score: _____/45

Pillar #3: Lifetime Patient Experience

1. We have a telephone script and protocol in place for all categories of incoming calls.
2. We have a script for all appointment confirmation calls.
3. We have a script and protocol for all patients entering the doors of the practice (front office).
4. We have a script and protocol for transitioning the patient from the waiting room to the treatment room.
5. We have a script and protocol for seating a patient.
6. We have a script and protocol for introduction/transition to doctor.
7. We have a script and protocol for treatment planning/ case presentation.
8. We have a script and protocol for transition to front office (check-out).
9. We have a script and protocol for checking out and reappointing each patient.



Date: _____

Pillar #4: New Patient Acquisition

Internal

Score: _____/25

1. We have a written system for obtaining patient referrals in place.
2. We hold certain team members accountable for maintaining a referral generation system.
3. We have a system for gathering doctor/patient photos, testimonials, and online reviews.
4. We hold the team accountable for a certain minimum number of photos, testimonials, and online reviews per week.
5. We have a system in place for locating and sponsoring a community outreach recipient every month.

External

Score: _____/30

1. We have a system for tracking the sources of each new patient and verifying its accuracy with the practice management software.
2. We have identified our monthly marketing budget and calculate the ROI on each campaign that we run.
3. We utilize tracking telephone numbers on all marketing campaigns whenever possible.
4. We do not sign long term contracts for any external marketing source unless its effectiveness has been tested and tracked.
5. We have identified our Avatar and intentionally design our external marketing campaigns to attract the ideal patient.
6. We plan our marketing campaigns out several months in advance and diversify the delivering of our marketing to as many different effective avenues as our budget can tolerate.



Date: _____

Score: _____/25

Pillar #5: Cash Flow/ Overhead Control

1. We are aware of the profession's ideal expense percentages and understand that elevated expenses in any category decrease the owner's profit.
2. We focus on profitability as our number one KPI secondary to productions, collections, and new patients.
3. We understand that debt is acceptable if it leveraged to create more profit, not just more revenue. We also understand that incurring debt to purchase depreciating assets that do not generate a profitable ROI will decrease the owner's net worth and cash flow.
4. We set hourly, daily, weekly, monthly, and yearly, adjusted production, collections, new patients and profitability benchmarks.
5. We track our KPI's from month to month and year to year.



Date: _____

Score: _____/30

Pillar #6: Hiring, Firing, On-Boarding

1. We have a systemized process for recruiting and vetting potential new team members.
2. We have a systemized process for training and on-boarding all new team members.
3. We have clearly defined the benchmarks and expectations for all new team members set for 30, 60, and 90 days of hire date.
4. We have bi-monthly performance reviews and self-assessments during the 90 day "Get Acquainted" period.
5. We are clear with our new team member of expectations and consequences for underperformance.
6. We have a systematic process for firing any team member.

Total _____/225

	<u>Assessment Score</u>	<u>Overhead</u>
Phase 0 (White Belt)	Less than 40%	Above 60%
Phase 1 (Blue Belt)	40% - 60%	56% - 60%
Phase 2 (Brown Belt)	61% - 79%	51% - 55%
Phase 3 (Black Belt)	80% - 100%	Below 50%