

# **The 2013 Management Planning Seminar**

## **Course Notes**

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Mastering Chiropractic with Certainty  
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# Acknowledgements

**I will always be grateful to my immediate family for knowingly shared me so that others may, in turn, have a better life.**

**I want to acknowledge all the speakers at this year's program who, out of their desire to help you and the profession be more aligned with our philosophy and purpose, have freely given of their time and talent to be here for you.**

**In particular, though not a speaker, a forceful and permanent career director in my life, I want to not only acknowledge but also dedicate this year's program to my field doctor. This year saw the passing of Dr. Tim E. Tarry...gone way to young from this earth. Tim most certainly changed my life for the better and, because of him, I have spent the last 35 years on the same path. I travel that path on the same quest knowing that every life I touch, I touch as a direct result of Tim because he saw more in me than I could see in myself.**

**Countless lives, families and generations have been, are and will continue to be positively impacted as a result of Tim taking the time to suggest that I "do something valuable" with my life.**

**One man's reach can directly touch 7 generations. He did. You are. My own son is. I am...And, the circle he started remains. God Bless you Tim.**

**Heartfelt thanks to all of you who have contributed to my life and development as a human being with the ability to help other people have what they want in life.**

**I also thank my clients who have stood by me through this year. My fondest wish is that it has been and continues to be a mutually beneficial relationship.**

**In particular...I wish to also acknowledge my cousin, Dr. Alan Weinstein for his forethought in helping me actualize a dream and have the public finally understand and associate chiropractic with health. And, I acknowledge Dr. Greg Anderson for his tireless devotion to the profession.**

**I would also like to thank both the ICONS of yesteryear and the ICONS to be of tomorrow for promulgating and protecting this incredible profession.**

**I hope this program acts as a catalyst for you to get where you wish to go. This profession has given me a life I once only dreamed of...it can do the same for you.**

**Dr. Steve Hoffman  
Encinitas, CA  
2012**

# ANNUAL MANAGEMENT PLANNING SEMINAR AGENDA

*Purpose: To create an organized, valuable and well-planned company which accomplishes it's objectives*

**Session Breaks will be 30 Minutes:**

Take advantage of one on one Psych-K sessions with Karen Hoffman (by advance appointment),

Get One on One assistance with the actual Planning Process and Visit On-Site Resources

## **Saturday, December 1, 2012-San Diego: Planning for Business Development**

- **8:00 - 9:00**      **Introductory Remarks – Dr. Steve Hoffman**  
Celebrate the day – meet and greet other like minded chiropractors  
Business and Practice Analysis Questionnaire and review  
The Mastery Model for Planning ANYTHING
- **9:00 - 10:00**    **Department by Department Review-Office Organizational Chart Management**
  - The Board of Directors
  - Incentive for Success
  - Annual objectives, projects and tasks
  - Advanced Statistics
  - Working from a Planner – Time Management
  - Time Management Alternative – The 3 Things Strategy
  - The Situation Report Form
  - Annual, Monthly and Weekly Planning Checklists
- **10:00 – 10:30**    **BREAK:**
- **10:30-11:30**    **Administration**
  - Review and Revise Facility and Faculty Plans
  - Staff Meetings and Staff Self-Evaluation**Finances**
  - Business income and expense projections
  - Policies
- **11:30 – 12:30**    **Steve Hoffman on the 3 Tier Marketing Strategy**  
**Alan Weinstein on Growing Your Market Share**
- **12:30 – 1:30**    **LUNCH BREAK**
- **1:30 - 2:30**      **Garrett Gunderson on Simplifying the Complexity YOU Face with Money**
- **2:30 - 3:30**      **Dr. Alan Weinstein on Tomorrow's Communications Technology Today**
- **3:30 – 4:00**      **BREAK**
- **4:00 - 5:00**      **Sales Strategies – Dr. Steve Hoffman**  
**Production Mindset – Dr. Steve Hoffman**  
**Quality Control – Dr. Steve Hoffman**
  - Review Personal Development, Tools, Forms, and Products
  - Miscellaneous planning
- **5:00 – 6:00**      **Closing Remarks**
- **6:00 - 7:30**      **Dinner Break**
- **7:30 - 10:00**    **CASH FLOW CAMP SPECIAL PRESENTATION!**
  - Dr. Steve Hoffman and Brandon Allen from FreedomFastTrack will show you how to take the financial pulse of your business so you can read the health of your business, determine early warning signs and pro-actively take the steps to keep your business thriving!
  - Obstacles that keep business owners from reviewing their financials
  - What statements you should look at in your business
  - What you don't know about your financials that's costing you money

**Note: This agenda is tentative pending speaker confirmations and Program title alterations**

# BUSINESS AND PRACTICE ANALYSIS QUESTIONNAIRE

Name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Directions: Mark with an X the following statements which describe a condition which either has existed in your business in the past, exists now and/or which you are concerned may exist in the future. If all or more than one are true, please mark an X in each of the appropriate boxes.

Management Concerns:	Past	Now	Future
1. I am disorganized	_____	_____	_____
2. I can't take a vacation	_____	_____	_____
3. I have too much paperwork	_____	_____	_____
4. I can't find anything in my files	_____	_____	_____
5. I work too many hours	_____	_____	_____
6. I have to do everything myself	_____	_____	_____
7. I don't have clear goals for my business	_____	_____	_____
8. I don't have clear personal goals	_____	_____	_____
9. I don't have clear family goals	_____	_____	_____
Finance Concerns:			
1. I don't have enough money	_____	_____	_____
2. I can't pay my bills on time	_____	_____	_____
3. I'm not making a profit	_____	_____	_____
4. I can't afford to hire staff	_____	_____	_____
5. I do not have a firm financial policy	_____	_____	_____
6. My overhead is too high	_____	_____	_____
7. I never know where I stand financially	_____	_____	_____
8. My cashflow is inconsistent	_____	_____	_____
9. I don't like collecting money	_____	_____	_____
Marketing/Sales Concerns:			
1. I don't have good marketing materials	_____	_____	_____
2. I don't know how to get new patients	_____	_____	_____
3. I don't know if I should advertise	_____	_____	_____
4. I don't know how to advertise	_____	_____	_____
5. My patients don't stay long enough	_____	_____	_____
6. I don't know how to attract families	_____	_____	_____
7. I don't know how to generate referrals	_____	_____	_____
8. I don't know how to reactivate inactives	_____	_____	_____
9. My practice is like a roller-coaster	_____	_____	_____
Administration/Production Concerns:			
1. I don't know how to find good staff	_____	_____	_____
2. I don't know how to train staff	_____	_____	_____
3. I do not have an office policy manual	_____	_____	_____
4. I do not have my own procedure manual	_____	_____	_____
5. I'm never sure tasks I assign are done on time	_____	_____	_____
6. I don't know how many people I can adjust/hour	_____	_____	_____
7. My patients run my schedule	_____	_____	_____
8. I never seem to be able to get everything done	_____	_____	_____
9. I need new equipment	_____	_____	_____

**Systems Solutions:**

Directions: Mark with an X the appropriate box (either yes or no) identifying the presence or absence of the following systems in your business. Indicate YES only if the system is in writing.

**Management Systems:**

Do you have a system for...	Yes	No
1. Planning your work to allow the most productive use of your time	_____	_____
2. Defining the organizational structure of your business	_____	_____
3. Scheduling your work so you can produce more in less time	_____	_____
4. Determining if business expansion is feasible or desirable	_____	_____
5. Organizing, processing and storing paperwork	_____	_____
6. Organizing, categorizing and setting up your files	_____	_____
7. Organizing and maintaining an orderly workplace	_____	_____
8. Assessing current and future operating needs/equipment needs	_____	_____
9. Keeping your finger on the pulse of your business	_____	_____

**Finance Systems:**

Do you have a system for...	Yes	No
1. Forecasting income so you can pay bills in a timely way	_____	_____
2. Evaluating your profitability	_____	_____
3. Evaluating overhead to determine if additional personnel are feasible or necessary	_____	_____
4. Calculating and tracking your operational expenses	_____	_____
5. Planning for future equipment or personnel needs	_____	_____
6. Collecting money owed in a systematic manner	_____	_____
7. Defining the overall financial goals of your company	_____	_____
8. Setting budget controls to attain your financial goals	_____	_____

**Marketing/Sales Systems:**

Do you have a system for...	Yes	No
1. Determining the number of new patients you need	_____	_____
2. Determining who your BEST clients are	_____	_____
3. Creating an Internal Marketing Calendar	_____	_____
4. Creating an External Marketing Calendar	_____	_____
5. Creating referrals	_____	_____
6. Patient education to create a family wellness practice	_____	_____
7. Community education to position your office in your community	_____	_____
8. Understanding how buying decisions are made	_____	_____
9. Developing responses to your patients most asked questions	_____	_____

**Administrative/Production Systems:**

Do you have a system for...	Yes	No
1. Recruiting new staff effectively	_____	_____
2. Effective hiring of new staff	_____	_____
3. Developing job descriptions for all staff	_____	_____
4. Training staff effectively	_____	_____
5. Scheduling patients	_____	_____
6. Scheduling tasks for timely completion	_____	_____
7. Scheduling staff to make most effective use of their time	_____	_____
8. Creating procedure manuals specific for your office	_____	_____
9. Ensuring your patients are satisfied	_____	_____

*INTRODUCTION*  
*THE MASTERY MODEL*

# THE MASTERY MODEL:

1. If your \_\_\_\_\_ could be perfect for you, what would it look like?
  - a. What would be a good result? \_\_\_\_\_
  - b. A better result? \_\_\_\_\_
  - c. An ideal result? \_\_\_\_\_
2. Who could you communicate this to that would support you? \_\_\_\_\_
3. What would you have to stop doing that you're currently doing to accomplish this?
  - a. What's your first action step? \_\_\_\_\_
  - b. When will you take this step? \_\_\_\_\_
  - c. What would be next? \_\_\_\_\_
4. What would you have to start doing that you're not doing to accomplish this?
  - a. What's your first action step? \_\_\_\_\_
  - b. When will you take this step? \_\_\_\_\_
  - c. What would be next? \_\_\_\_\_
5. Why is this so important to you? Specifically, what would be so good about it if you could accomplish it? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. What will you need to know how to do? \_\_\_\_\_
  - a. What will need to get done? \_\_\_\_\_
  - b. How will it need to get done? \_\_\_\_\_
7. How close are you to accomplishing this objective? \_\_\_\_\_
  - a. What determines how quickly you can get there? \_\_\_\_\_
  - b. What weaknesses that will have to be overcome? \_\_\_\_\_
  - c. What strengths do you have that will help? \_\_\_\_\_
  - d. What other obstacles can you foresee? \_\_\_\_\_
8. What does the timeline look like? By when? \_\_\_\_\_
  - a. What interim goals could you create with rewards for accomplishment?
    - i. 5 Individual Objectives and Rewards
      1. \_\_\_\_\_
      2. \_\_\_\_\_
      3. \_\_\_\_\_
      4. \_\_\_\_\_
      5. \_\_\_\_\_
    - ii. 5 Company Objectives and Rewards for the first Quarter
      1. \_\_\_\_\_
      2. \_\_\_\_\_
      3. \_\_\_\_\_
      4. \_\_\_\_\_
      5. \_\_\_\_\_

iii. 5 Company Objectives and Rewards for the year 2013

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

b. How else will you do to stay motivated? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. What resources will you need?

- a. Personally \_\_\_\_\_
- b. For the First Quarter \_\_\_\_\_
- c. For the Year 2013 \_\_\_\_\_

10. What will be your job description (your list of responsibilities)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. What will you want to get out of it?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12. How will this impact other people and other aspects of your life?

- a. 2 Minute Drill
- b. Is it worth doing?
- c. Is it ok with you to accomplish?
- d. What would make it ok? \_\_\_\_\_

13. Sensory goals

- a. What will you see that will tell you that you accomplished your goal?  
\_\_\_\_\_
- b. What will you hear when you've accomplished your goal?  
\_\_\_\_\_
- c. What will you feel when you've accomplished your goal?  
\_\_\_\_\_
- d. What kind of energy surrounds the accomplishment of your goal?  
\_\_\_\_\_

14. Since \_\_\_\_\_ is perfect for you, what does it look like now?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# *THE THEME*

## *FOR THE PLANNING SEMINAR*

### *FOR NEXT YEAR...FOR YOUR LIFE*

#### *BE A HERO...SAVE LIVES...BE PRODUCTIVE*

#### **Francisco's 'Money' Speech from "Atlas Shrugged"**

*"So you think that money is the root of all evil?" said Francisco d'Aconia. "Have you ever asked what is the root of money? Money is a tool of exchange, which can't exist unless there are goods produced and men able to produce them. Money is the material shape of the principle that men who wish to deal with one another must deal by trade and give value for value. Money is not the tool of the moochers, who claim your product by tears, or of the looters, who take it from you by force. Money is made possible only by the men who produce. Is this what you consider evil?"*

*"When you accept money in payment for your effort, you do so only on the conviction that you will exchange it for the product of the effort of others. It is not the moochers or the looters who give value to money. Not an ocean of tears nor all the guns in the world can transform those pieces of paper in your wallet into the bread you will need to survive tomorrow. Those pieces of paper, which should have been gold, are a token of honor – your claim upon the energy of the men who produce. Your wallet is your statement of hope that somewhere in the world around you there are men who will not default on that moral principle which is the root of money. Is this what you consider evil?"*

*"Have you ever looked for the root of production? Take a look at an electric generator and dare tell yourself that it was created by the muscular effort of unthinking brutes. Try to grow a seed of wheat without the knowledge left to you by men who had to discover it for the first time. Try to obtain your food by means of nothing but physical motions – and you'll learn that man's mind is the root of all the goods produced and of all the wealth that has ever existed on earth.*

*"But you say that money is made by the strong at the expense of the weak? What strength do you mean? It is not the strength of guns or muscles. Wealth is the product of man's capacity to think. Then is money made by the man who invents a motor at the expense of those who did not invent it? Is money made by the intelligent at the expense of the fools? By the able at the expense of the incompetent? By the ambitious at the expense of the lazy? Money is made – before it can be looted or mooched – made by the effort of every honest man, each to the extent of his ability. An honest man is one who knows that he can't consume more than he has produced.*

*"To trade by means of money is the code of the men of good will. Money rests on the axiom that every man is the owner of his mind and his effort. Money allows no power to prescribe the value of your effort except by the voluntary choice of the man who is willing to trade you his effort in return. Money permits you to obtain for your goods and your labor that which they are worth to the men who buy them, but no more. Money permits no deals except those to mutual benefit by the unforced judgment of the traders. Money demands of you the recognition that men must work for their own benefit, not for their own injury, for their gain, not their loss – the recognition that they are not beasts of burden, born to carry the weight of your misery – that you must offer them values, not wounds – that the common bond among men is not the exchange of suffering, but the exchange of goods. Money demands that you sell, not your weakness to men's stupidity, but your talent to their reason; it demands that you buy, not the shoddiest they offer, but the best your money can find. And when men live by trade – with reason, not force, as their final arbiter – it is the best product that wins, the best performance, then man of best judgment and highest ability – and the degree of a man's productiveness is the degree of his reward. This is the code of existence whose tool and symbol is money. Is this what you consider evil?"*

*"But money is only a tool. It will take you wherever you wish, but it will not replace you as the driver. It will give you the means for the satisfaction of your desires, but it will not provide you with desires. Money is the scourge of the men who attempt to reverse the law of causality – the men who seek to replace the mind by seizing the products of the mind.*

*"Money will not purchase happiness for the man who has no concept of what he wants; money will not give him a code of values, if he's evaded the knowledge of what to value, and it will not provide him with a purpose, if he's evaded the choice of what to seek. Money will not buy intelligence for the fool, or admiration for the coward, or respect for the incompetent. The man who attempts to purchase the brains of his superiors to serve him, with his money replacing his judgment, ends up by becoming the victim of his inferiors. The men of intelligence desert him, but the cheats and the frauds come flocking to him, drawn by a law which he has not discovered: that no man may be smaller than his money. Is this the reason why you call it evil?"*

*"Only the man who does not need it, is fit to inherit wealth – the man who would make his own fortune no matter where he started. If an heir is equal to his money, it serves him; if not, it destroys him. But you look on and you cry that money corrupted him. Did it? Or did he corrupt his money? Do not envy a worthless heir; his wealth is not yours and you would have done no better with it. Do not think that it should have been distributed among you; loading the world with fifty parasites instead of one would not bring back the dead virtue which was the fortune. Money is a living power that dies without its root. Money will not serve that mind that cannot match it. Is this the reason why you call it evil?"*

*"Money is your means of survival. The verdict which you pronounce upon the source of your livelihood is the verdict you pronounce upon your life. If the source is corrupt, you have damned your own existence. Did you get your money by fraud? By pandering to men's vices or men's stupidity? By catering to fools, in the hope of getting more than your ability deserves? By lowering your standards? By doing work you despise for purchasers you scorn? If so, then your money will not give you a moment's or a penny's worth of joy. Then all the things you buy will become, not a tribute to you, but a reproach; not an achievement, but a reminder of shame. Then you'll scream that money is evil. Evil, because it would not pinch-hit for your self-respect? Evil, because it would not let you enjoy your depravity? Is this the root of your hatred of money?"*

*"Money will always remain an effect and refuse to replace you as the cause. Money is the product of virtue, but it will not give you virtue and it will not redeem your vices. Money will not give you the unearned, neither in matter nor in spirit. Is this the root of your hatred of money?"*

*"Or did you say it's the love of money that's the root of all evil? To love a thing is to know and love its nature. To love money is to know and love the fact that money is the creation of the best power within you, and your passkey to trade your effort for the effort of the best among men. It's the person who would sell his soul for a nickel, who is the loudest in proclaiming his hatred of money – and he has good reason to hate it. The lovers of money are willing to work for it. They know they are able to deserve it."*

*"Let me give you a tip on a clue to men's characters: the man who damns money has obtained it dishonorably; the man who respects it has earned it."*

*"Run for your life from any man who tells you that money is evil. That sentence is the leper's bell of an approaching looter. So long as men live together on earth and need means to deal with one another – their only substitute, if they abandon money, is the muzzle of a gun."*

*"But money demands of you the highest virtues, if you wish to make it or to keep it. Men who have no courage, pride, or self-esteem, men who have no moral sense of their right to their money and are not willing to defend it as they defend their life, men who apologize for being rich – will not remain rich for long. They are the natural bait for the swarms of looters that stay under rocks for centuries, but come crawling out at the first smell of a man who begs to be forgiven for the guilt of owning wealth. They will hasten to relieve him of the guilt – and of his life, as he deserves."*

*"Then you will see the rise of the double standard – the men who live by force, yet count on those who live by trade to create the value of their looted money – the men who are the hitchhikers of virtue. In a moral society, these are the criminals, and the statutes are written to protect you against them. But when a society establishes criminals-by-right and looters-by-law – men who use force to seize the wealth of disarmed victims – then money becomes its creators' avenger. Such looters believe it safe to rob defenseless men, once they've passed a law to disarm them. But their loot becomes the magnet for other looters, who get it from them as they got it. Then the race goes, not to the ablest at production, but to those most ruthless at brutality. When force is the standard, the murderer wins over the pickpocket. And then that society vanishes, in a spread of ruins and slaughter."*

*"Do you wish to know whether that day is coming? Watch money. Money is the barometer of a society's virtue. When you see that trading is done, not by consent, but by compulsion – when you see that in order to produce, you need to obtain permission from men who produce nothing – when you see that money is flowing to those who deal, not in goods, but in favors – when you see that men get richer by graft and by pull than by work, and your laws don't protect you against them, but protect them against you – when you see corruption being rewarded and honesty becoming a self-sacrifice – you may know that your society is doomed. Money is so noble a medium that it does not compete with guns and it does not make terms with brutality. It will not permit a country to survive as half-property, half-loot."*

*"Whenever destroyers appear among men, they start by destroying money, for money is men's protection and the base of a moral existence. Destroyers seize gold and leave to its owners a counterfeit pile of paper. This kills all objective standards and delivers men into the arbitrary power of an arbitrary setter of values. Gold was an objective value, an equivalent of wealth produced. Paper is a mortgage on wealth that*

*does not exist, backed by a gun aimed at those who are expected to produce it. Paper is a check drawn by legal looters upon an account which is not theirs: upon the virtue of the victims. Watch for the day when it becomes, marked: 'Account overdrawn.'*

*"When you have made evil the means of survival, do not expect men to remain good. Do not expect them to stay moral and lose their lives for the purpose of becoming the fodder of the immoral. Do not expect them to produce, when production is punished and looting rewarded. Do not ask, 'Who is destroying the world?' You are.*

*"You stand in the midst of the greatest achievements of the greatest productive civilization and you wonder why it's crumbling around you, while you're damning its life-blood – money. You look upon money as the savages did before you, and you wonder why the jungle is creeping back to the edge of your cities. Throughout men's history, money was always seized by looters of one brand or another, but whose method remained the same: to seize wealth by force and to keep the producers bound, demeaned, defamed, deprived of honor. That phrase about the evil of money, which you mouth with such righteous recklessness, comes from a time when wealth was produced by the labor of slaves – slaves who repeated the motions once discovered by somebody's mind and left unimproved for centuries. So long as production was ruled by force, and wealth was obtained by conquest, there was little to conquer. Yet through all the centuries of stagnation and starvation, men exalted the looters, as aristocrats of the sword, as aristocrats of birth, as aristocrats of the bureau, and despised the producers, as slaves, as traders, as shopkeepers – as industrialists.*

*"To the glory of mankind, there was, for the first and only time in history, a country of money – and I have no higher, more reverent tribute to pay to America, for this means: a country of reason, justice, freedom, production, achievement. For the first time, man's mind and money were set free, and there were no fortunes-by-conquest, but only fortunes-by-work, and instead of swordsmen and slaves, there appeared the real maker of wealth, the greatest worker, the highest type of human being – the self-made man – the American industrialist.*

*"If you ask me to name the proudest distinction of Americans, I would choose – because it contains all the others – the fact that they were the people who created the phrase 'to make money'. No other language or nation had ever used these words before; men had always thought of wealth as a static quantity – to be seized, begged, inherited, shared, looted, or obtained as a favor. Americans were the first to understand that wealth has to be created. The words 'to make money' hold the essence of human morality.*

*"Yet these were the words for which Americans were denounced by the rotted cultures of the looters' continents. Now the looters' credo has brought you to regard your proudest achievements as a hallmark of shame, your prosperity as guilt, your greatest men, the industrialists, as blackguards, and your magnificent factories as the product and property of muscular labor, the labor of whip-driven slaves, like the pyramids of Egypt. The rotter who simpers that he sees no difference between the power of the dollar and the power of the whip, ought to learn the difference on his own hide – as, I think, he will.*

*"Until and unless you discover that money is the root of all good, you ask for your own destruction. When money ceases to be the tool by which men deal with one another, then men become the tools of men. Blood, whips and guns – or dollars. Take your choice – there is no other – and your time is running out."*



*MANAGEMENT  
AND MANAGEMENT  
PLANNING*

## OFFICE ORGANIZATIONAL CHART

1. MANAGEMENT: A VIABLE AND EXPANDING ORGANIZATION MEASURED BY THE % OF PATIENTS REMAINING MORE THAN 9 MONTHS AND THE NET WORTH OF THE BUSINESS. INCLUDES LEGAL, ACCOUNTING, CORPORATE STRUCTURE, RETIREMENT PLANNING AND FUTURE VISION.
2. ADMINISTRATION: AN ESTABLISHED ORGANIZATION WITH FULLY TRAINED AND RELIABLE STAFF. INCLUDES PERSONNEL, INTER-OFFICE COMMUNICATIONS AND OFFICE POLICY.
3. FINANCE: REFLECTED BY MORE INFLOW THAN OUTFLOW. INCLUDES INCOME, RECORDS AND DISBURSEMENTS.
4. PATIENT MANAGEMENT: NUMBER OF PATIENTS WHO WANT AND ARE GETTING LIFETIME CARE AND NUMBER OF ACTIVE PATIENTS.
  - A. CASE MANAGEMENT
  - B. PATIENT EDUCATION
  - C. REPORT OF FINDINGS
5. CHIROPRACTIC SERVICES: MEASURED BY THE NUMBER OF PRACTICE MEMBERS WHO HAVE GAINED OR RE-GAINED AND MAINTAINED THEIR OPTIMAL HEALTH THROUGH OUR CARE. INCLUDES VISIT VOLUME AND SERVICES RENDERED.
  - A. FRONT DESK
  - B. SUPPLEMENTAL SERVICES
  - C. CHIROPRACTIC CARE
6. QUALITY CONTROL: SATISFIED AND EXCITED PATIENTS THAT STAY (RETENTION) AND REFER
  - A. EXAMINATION PROCEDURES
  - B. KAIZEN
  - C. STAFF TRAINING
7. MARKETING: NEW PATIENTS
  - A. PR
  - B. ADVERTISING
  - C. EVENTS
  - D. REFERRALS
  - E. RECALL

# Mission Statements, etc.

**Vision Statement:** What you are trying to accomplish.

**Purpose Statement:** Why you want to accomplish it.

**Mission Statement:** How you plan to accomplish it.

## **Why?**

Without a clear cut vision, goal or objective there would be no way to know whether you had accomplished your mission. The inherent confusion wrought by the absence of a definite purpose and a passionate mission is that we cannot enroll others in our vision. Without a team and without a purpose...what truly is there?

## **Corporate:**

Through inspired work and a fair exchange of value we will elevate chiropractic to a position of global dominance in health care delivery by instilling an innate awareness in both chiropractors and non-chiropractors alike. We will create, promote and disseminate the information, programs and tools necessary to shift both the public's and the profession's consciousness away from an allopathic model and towards a vitalistic one. **Example is 2ndCousins, Inc Media and Marketing.**

## **Client Based:**

To provide the programs, products and services that facilitate chiropractors in the development of family based, health development practices predicated on patient education, technical certainty and a systems approach to business and practice development.

## **Coaching:**

To locate the thinking, feeling and behavioral blocks standing in the way of my clients being, doing and having what they want. And then, actively engaging them in business and practice development.

## **Seminars:**

To provide doctors with certainty and solutions to practice contradictions allowing them to deliver their service in a more effective, efficient and elegant way.

## **Products:**

To provide the tools necessary to expand the understanding and desire for chiropractic services amongst the doctor's patients and community.

## **Vision:**

By addressing our doctor's greatest concerns and resolving them, we provide them with the certainty in technique, business and practice development that allow them to balance their business, practice, clinical outcomes and personal lives in a more effective, efficient and elegant way.

We provide the tools necessary in patient and community education to expand the understanding of and desire for chiropractic services among the doctor's patients and community.



# YOUR BOARD OF DIRECTORS

WHO DO YOU TAKE COUNSEL FROM?

WHO HELPS YOU GROW YOUR BUSINESS?

WHO ADDS VALUE TO YOUR COMPANY?

MY BOARD OF DIRECTORS CONSISTS OF:

1. BUSINESS PARTNERS
2. FINANCIAL ADVISOR
3. ATTORNEY
4. INVESTMENT STRATEGIST
5. LEGACY PLANNER
6. ACCOUNTANT
7. BOOK KEEPER
8. MARKETING GURU
9. WEB MASTER
10. COACH

A PATIENT'S 'HEALTHY' BOARD OF DIRECTORS MIGHT INCLUDE:

1. CHIROPRACTOR
2. PERSONAL TRAINER
3. NUTRITIONIST OR METABOLIC TYPING SPECIALIST
4. MASSAGE THERAPIST
5. YOGA INSTRUCTOR
6. PSYCHOLOGIST OR PSYCH-K PRACTITIONER
7. STRESS MANAGEMENT SPECIALIST
8. HABIT CHANGER
9. EXCUSE REMOVER
10. COMPLIANCE OFFICER

YOU GET THE IDEA. WHOSE ON YOUR BOARD OF DIRECTORS?

# Incentives for Success

What would “having it all” look like for you? Don't be reasonable but do be accurate. Make it real and make it personal. This is all about YOU!

<u>ITEM:</u>	<u>WHY THAT?</u>	<u>COST/MO</u>
Your dream house:		
Your dream car:		
Your dream holiday:		
Your dream relationship:		
Your dream family:		
Your dream career:		
Your dream finances:		
Your dream future:		
Your dream health:		

## **Annual Objectives, Projects and Tasks**

**Your 3 most important personal objectives:**

**Your 3 most important business objectives:**

**Your 3 most important practice objectives:**

**Now, for each, create a project list...**

**And, for each project, create a task list...**

**And, for each task, create a due date...**

**Enroll others...WHAT IF EVERYONE  
ACCEPTED THE RESPONSIBILITY TO  
COMPLETE 3 TASKS A DAY? WHAT IF?**

**Reward yourself and them for completions**

# Advanced Statistics

Month / Year	Projected Collections	Actual Collections	Delta Collections	New Patients	Recalled Patients	Attended Class	Attended Report	Scans Performed	Projected Adjustments	Actual Adjustments	Delta Adjustments	Missed Appt's	MA Resched	Cancelled Appt's	CA Resched	Call Ins	Walk Ins
Last Year																	
This Year:																	
January																	
February																	
March																	
April																	
May																	
June																	
July																	
August																	
September																	
October																	
November																	
December																	
Total/Year																	

Quality Control Stats:      Have Referred      Patient <3 months      Patient >3<9 months      Patient >9 months

End of first quarter      \_\_\_\_\_

End of second quarter      \_\_\_\_\_

End of third quarter      \_\_\_\_\_

End of fourth quarter      \_\_\_\_\_

End of Year      \_\_\_\_\_

# WORKING FROM A PLANNER

OTHER THAN YOUR SCHEDULE, FEW BUSINESS TOOLS ARE AS IMPORTANT AS YOUR PLANNER. YOU CAN USE THE PLANNER FOR ALL YOUR PROJECTS, TO DO'S AND IDEAS. YOU CAN ALSO USE IT WITH PATIENTS TO SET UP THEIR CARE PROGRAM OR HEALTH DEVELOPMENT PROGRAM.

MY PLANNER HAS A NUMBER OF CATEGORIES AND THEY ARE:

\*NO. (THIS IS THE PRIORITY OR ORDER OF YOUR ITEM OR ACTION STEP)

\*A-F (THIS IS HOW WE PRIORITIZE TASKS BY IMPORTANCE)

\*ACTION STEPS (THESE ARE THE ACTUAL STEPS TO BE TAKEN IN ORDER TO REALIZE THE GOAL OR OBJECTIVE)

\*PEOPLE (WHO'S RESPONSIBLE FOR COMPLETING THAT PARTICULAR ACTION STEP?)

\*COST (IS THERE A COST INVOLVED?)

\*HOURS (HOW MUCH TIME WILL/SHOULD IT TAKE FOR THIS STEP TO BE COMPLETED?)

\*START (WHEN WILL THIS STEP START?)

\*FINISH (WHEN WILL/SHOULD THIS STEP BE COMPLETED BY?)

\*SCHEDULED (THIS IS THE MOST IMPORTANT STEP...HAVE YOU ALLOCATED THE TIME IN YOUR SCHEDULE THAT YOU HAVE INDICATED WOULD BE NEEDED FOR THE COMPLETION OF THIS STEP?) IF IT ISN'T IN YOUR SCHEDULE, IT WILL LIKELY NOT BE DONE. JUST LIKE IF YOUR PATIENT DOESN'T SCHEDULE THEIR NEXT APPOINTMENT.

SIDE NOTE: IF YOU PREFER ELECTRONIC OR ON-LINE TOOLS, I RECOMMEND BOTH OUTLOOK AND [WWW.TEUXDEUX.COM](http://WWW.TEUXDEUX.COM)



# TIME MANAGEMENT CONCEPTS

READ BRIAN TRACY'S BOOK, EAT THAT FROG

CLEAN YOUR SPACE

9 TASK LISTS IN OUTLOOK

BUSINESS

PRACTICE

PERSONAL

LONG RANGE

SHORT RANGE

IMMEDIATE...GOES ON A PAPER/PLANNER/SCHEDULE

3 THINGS LIST-POSTED LIST

EFFICIENCY-DO NOW

TIME MANAGEMENT-PRIORITIZE/SCHEDULE

DELEGATION

THINGS TO DO LIST WHEN THERE'S NOTHING TO DO

BE PROACTIVE

PATIENT TIME/PAPAERTIME

BUSIER WE GET-THE SLOWER WE GO

3 STAFF MEETINGS

BUSINESS STAFF MEETING

[WWW.TEUXDEUX.COM](http://WWW.TEUXDEUX.COM)

# Situation Report

TO: \_\_\_\_\_ DATE: \_\_\_ / \_\_\_ / \_\_\_ FROM: \_\_\_\_\_

SITUATION:

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ALL STEPS NECESSARY TO RESOLVE SITUATION:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

WHAT PRIORITY IS THIS? URGENT 24 HOURS THIS WEEK THIS MONTH

RECOMMENDED SOLUTION:

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ACCEPTED, PROCEED REJECTED, NEED MORE DATA REJECTED, SEE ME

DATE: \_\_\_ / \_\_\_ / \_\_\_ COMMENTS:

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# MANAGEMENT ANNUAL PLANNING CHECKLIST

## PRINCIPLE PURPOSE OF POSITION

**Effective and well planned company which causes predictable profits and expansion.**

## DUTIES AND RESPONSIBILITIES:

- 1. Business Manual—current and accurate**
- 2. Mission Statement—review and redo-attach a copy**
- 3. Organizational Chart—current and accurate**
- 4. VISION—per department**
- 5. Determine personal income and expense projections**
- 6. Determine business income and expense projections**
  - 6a. Review P&L's with Finance**
  - 6b. Schedule Tax Planning meeting**
- 7. Review and revise Job Descriptions, Annual Goals and Monthly Planners—per department**
- 8. Planning—review each planner action step, etc.**
- 9. Schedule next year Annual Planning – Christmas Week**
- 10. Pilot Projects: Research & Development**
- 11. New Programs**
- 12. Supervising: legal, government relations, CPA, financial consultant, attorney**

## STATISTICS:

**Percentage of Profit to Plan**

**All departments meeting goals**

# MONTHLY MANAGEMENT PLANNING CHECKLIST

DATE: \_\_\_\_\_

- .5 hrs ○ MANAGEMENT: REVIEW PLANNERS FOR POSSIBLE ACTIVITIES
  - SCHEDULE IN OUTLOOK
- 2 hrs ○ FINANCE: CREATE LIST OF TO DO'S FOR RANDI
  - SCHEDULE TO DO'S
  - MEET WITH RANDI/REVIEW JOB DESCRIPTION, PLANNER, TO DO'S
- PROJECTED VS ACTUAL FOR LAST MONTH
  - ADJUST FOR UPCOMING MONTH
  - REVIEW PROJECTION
  - LIST ACTIVE COACHING CLIENTS
  - REVIEW A/R WITH RANDI AND KAREN
  - REVIEW PROJECTED SALES/INCOME FOR THE MONTH
- PRODUCTION: MEET WITH SHIPPING DEPARTMENT RE JOB DESCR., PLANNER
  - REVIEW KAREN'S CHECKLIST
  - PRODUCT INVENTORY SYSTEM REVIEW
- 2 hrs ○ REVIEW ALL PRODUCTION PLANNERS FOR APPTS AND OPENINGS
  - REVIEW ALL PRODUCTION PLANNERS AND TIME ACTIVATE
- RECORD FLIGHT SCHEDULE FOR COMING MONTH IN OUTLOOK
- REVIEW PROJECTS DUE, PUT IN PLANNER AND SCHEDULE
  - CROSS CHECK COACHING CLIENT LIST W/ SCHEDULE
  - PRINT SCHEDULE FOR THE MONTH
- ADMINISTRATION: REVIEW OFFICE PLANNER
  - UPDATE VIRUS DEFENSE
  - OFFICE AND CLEAR DESK AND COUNTERTOPS OF ALL FILES
- .25 hrs ○ MARKETING: REVIEW MARKETING PLAN AND SCHEDULE ACTIVITIES
- SALES: REVIEW LEADS AND SCHEDULE SALES CALLS
- QUAL: REVIEW SURVEYS
- .25 hrs ○ CELEBRATE!
- .25 hrs
- .25 hrs

# WEEKLY MANAGEMENT PLANNING CHECKLIST

DATE: \_\_\_\_\_

- EXECUTIVE
  - REVIEW CALENDAR: (1/2 HOUR)
    - MONTHLY FOR OPENINGS AND OBLIGATIONS
    - SEMINARS-SCHEDULE PRINTING OF MATERIALS
    - DEADLINES/PLANNERS TO SCHEDULE
  - FINANCE (1/2 HOUR)
    - MEETING
  - PRODUCTION (1 1/2 HOURS)
    - ORDERS PENDING-KAREN
    - PREPARE COACHING AGENDA
    - WRITE PRACTICE TIP
    - WRITE HEALTH TIP
  - ADMINISTRATIVE (1/4 HOUR)
    - OFFICE CLEAN
    - UPDATE VIRUS DEFENSE
  - MARKETING (1/4 HOUR)
    - SCHEDULE ACTIONS
  - SALES (1/4 HOUR)
    - SCHEDULE SALES CALLS (SEMINARS, SUBSCRIBERS)
  - QUAL (1/4 HOUR)
- OTHER ACTIONS TO BE SCHEDULED (1/2 HOUR)
  - TO DO LIST
  - CALLS
  - E-MAILS
- CELEBRATE!





# THE MASTERY MODEL:

1. If your \_\_\_\_\_ could be perfect for you, what would it look like?
  - a. What would be a good result? \_\_\_\_\_
  - b. A better result? \_\_\_\_\_
  - c. An ideal result? \_\_\_\_\_
2. Who could you communicate this to that would support you? \_\_\_\_\_
3. What would you have to stop doing that you're currently doing to accomplish this?
  - a. What's your first action step? \_\_\_\_\_
  - b. When will you take this step? \_\_\_\_\_
  - c. What would be next? \_\_\_\_\_
4. What would you have to start doing that you're not doing to accomplish this?
  - a. What's your first action step? \_\_\_\_\_
  - b. When will you take this step? \_\_\_\_\_
  - c. What would be next? \_\_\_\_\_
5. Why is this so important to you? Specifically, what would be so good about it if you could accomplish it?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. What will you need to know how to do? \_\_\_\_\_
  - a. What will need to get done? \_\_\_\_\_
  - b. How will it need to get done? \_\_\_\_\_
7. How close are you to accomplishing this objective? \_\_\_\_\_
  - a. What determines how quickly you can get there? \_\_\_\_\_
  - b. What weaknesses that will have to be overcome? \_\_\_\_\_
  - c. What strengths do you have that will help? \_\_\_\_\_
  - d. What other obstacles can you foresee? \_\_\_\_\_
8. What does the timeline look like? By when? \_\_\_\_\_
  - a. What interim goals could you create with rewards for accomplishment?
    - i. 5 Individual Objectives and Rewards
      1. \_\_\_\_\_
      2. \_\_\_\_\_
      3. \_\_\_\_\_
      4. \_\_\_\_\_
      5. \_\_\_\_\_
    - ii. 5 Company Objectives and Rewards for the first Quarter
      1. \_\_\_\_\_
      2. \_\_\_\_\_
      3. \_\_\_\_\_
      4. \_\_\_\_\_
      5. \_\_\_\_\_

iii. 5 Company Objectives and Rewards for the year 2013

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

b. How else will you do to stay motivated? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. What resources will you need?

- a. Personally \_\_\_\_\_
- b. For the First Quarter \_\_\_\_\_
- c. For the Year 2013 \_\_\_\_\_

10. What will be your job description (your list of responsibilities)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. What will you want to get out of it?

\_\_\_\_\_  
\_\_\_\_\_

12. How will this impact other people and other aspects of your life?

- a. 2 Minute Drill
- b. Is it worth doing?
- c. Is it ok with you to accomplish?
- d. What would make it ok? \_\_\_\_\_

13. Sensory goals

- a. What will you see that will tell you that you accomplished your goal?  
\_\_\_\_\_
- b. What will you hear when you've accomplished your goal?  
\_\_\_\_\_
- c. What will you feel when you've accomplished your goal?  
\_\_\_\_\_
- d. What kind of energy surrounds the accomplishment of your goal?  
\_\_\_\_\_

14. Since \_\_\_\_\_ is perfect for you, what does it look like now?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*ADMINISTRATION  
AND FINANCES*



# FACILITY AND FACULTY PLANS

MOST 'OFFICE MANAGERS' ARE ACTUALLY OFFICE ADMINISTRATORS.

ADMINISTRATION FOCUSES PRIMARILY ON THE FACILITY AND THE FACULTY.

SO WHO'S IN CHARGE OF THIS DEPARTMENT?

DO THEY HAVE A JOB DESCRIPTION THEMSELVES SINCE THEY ARE THE GUARDIANS OF THE OFFICE POLICY MANUAL AND THE OFFICE PROCEDURE MANUAL.

DO YOU MEET REGULARLY TO MAKE SURE YOU ARE ALWAYS PREPARED FOR GROWTH OR DO YOU PUT OUT THAT FIRE AFTER IT OCCURS?

IF YOU WERE TO ACCOMPLISH YOUR OBJECTIVES FOR THE COMING YEAR:

1. WILL YOUR FACILITY SUFFICE?
2. WILL YOU CHANGE ANYTHING? WHEN? TO WHAT?
3. WILL YOU BE UPGRADING ANYTHING? WHAT? WHEN?
4. WHAT ABOUT YOUR COMPUTERS? DO THEY NEED UPGRADING?
5. WHAT ABOUT YOUR OFFICE SOFTWARE SYSTEM?
6. WHAT ABOUT YOUR CASH PLAN SYSTEM?
7. WHAT ABOUT YOUR MARKETING SYSTEM AND WHO WILL HEAD IT UP?
8. WHO WILL HANDLE PAYROLL?
9. WILL YOU GET A PERSONAL ASSISTANT THIS YEAR?
10. WILL YOU HIRE STAFF IN ADVANCE OF GROWTH OR AFTER THE FACT?
11. DO YOU HAVE JOB DESCRIPTIONS FOR EVERYONE?
12. DO YOU HAVE A HIRING PROCEDURE?

# Daily Briefing

## Agenda:

1. What ONE THING did not work for you last week and what do you recommend we do to resolve it?
  - a. Discussion
  - b. Resolution
2. What ONE THING worked best for you last week and what do you recommend we do to improve/continue it?
3. Acknowledgements
4. What can we do to make today PLAY?
5. How can we raise and maintain our individual and collective energy today?
6. How can we go the extra mile today?
7. Make someone's day...who? \_\_\_\_\_
8. Flipchart
  - a. Three prioritized tasks that were started and completed YESTERDAY
  - b. Actual result
  - c. Impact on the Company
  - d. Three prioritized tasks that will be started and completed TODAY
  - e. Expected result
  - f. Impact on the Company
9. Concept for the day?
10. Special Patient Communications today

# STAFF TRAINING PROTOCOLS

THERE ARE ONLY 3 TYPES OF PRACTICES WHEN IT COMES TO TRAINING STAFF:

1. YOU HAVE NO PROCEDURE MANUAL
2. YOU HAVE SOMEONE ELSE'S PROCEDURE MANUAL
3. YOU ARE CREATING YOUR OWN PROCEDURE MANUAL

CLEARLY, THE ONLY WAY THAT TRULY WORKS FOR PRACTICE DEVELOPMENT IS TO CREATE YOUR OWN MANUAL BASED ON DISCOVERING THE PROCEDURES THAT PRODUCE THE RESULTS YOU ARE LOOKING FOR.

HERE'S WHAT WORKED FOR ME:

1. CREATE A PLANNER TO DETERMINE EXACTLY WHAT YOU WANT THE STAFF PERSON TO KNOW AND DO AND THE PRIORITY YOU HAVE ON THEM KNOWING AND DOING WHAT YOU WANT.
2. NEXT, SCHEDULE THE TIME TO EXPLAIN AND DEMONSTRATE.
3. TAKE YOUR FIRST PRIORITY ITEM AND DEMONSTRATE EXACTLY HOW YOU WANT IT DONE WHILE THE STAFF PERSON OBSERVES, PARTICIPATES, QUESTIONS AND TAKES NOTES.
4. THE STAFF PERSON TYPES UP THEIR NOTES AND SUBMITS THEM TO YOU FOR REVIEW.
5. YOU EITHER ACCEPT OR AMEND THE NOTES.
6. THE STAFF PERSON THEN DUPLICATES THE PROCEDURE BACK TO YOU BASED ON THEIR NOTES RATHER THAN THEIR MEMORY.
7. IF CORRECTLY DONE, A COPY OF THE PROCEDURE GOES INTO THEIR MANUAL AND INTO YOURS.
8. REVIEW AND REVISE AS NEEDED.

### **“Three Things” Staff Self-Evaluation Form**

This form is designed to help you achieve great success while working at (your office name). It will help you stay clear about what your goals are and what areas of your business you are intending to improve upon. It will help you distinguish your strengths and opportunities thus allowing you to accelerate your success.

This form needs to be completed and returned to Dr. \_\_\_\_\_ by \_\_\_\_\_.

**Your Name:** \_\_\_\_\_ **Today’s Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_.

1. What 3 ideas can you contribute to help our growth and reputation (be specific):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

2. List 3 ways you see yourself participating in our success 5 years from now? (be specific):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

3. Please list 3 things that you feel you can improve upon (be specific):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

4. Please list 3 ways that you feel we can do better (be specific):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

5. Please list 3 things that you feel you are doing well (be specific):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

6. Please list 3 goals that you are going to work on achieving in the next 6 months (be specific)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_



# CELEBRATING YOUR LIFE

HERE'S A GARRETT GUNDERSON "SACRED COW" MYTH:

1. SET UP INTERIM GOALS...
2. BEAT YOURSELF UP EVERY TIME YOU "FAIL" TO ACHIEVE IT
3. DO NOT CELEBRATE WHEN YOU DO ACHIEVE IT
4. SET UP ANOTHER INTERIM GOAL...
5. BEAT YOURSELF UP EVERY TIME YOU "FAIL" TO ACHIEVE IT
6. DO NOT CELEBRATE WHEN YOU DO ACHIEVE IT
7. REPEAT OVER AND OVER AGAIN THINKING THAT SETTING GOALS IS IN KEEPING WITH THE LAW OF ATTRACTION

THE PROBLEM WITH THIS KIND OF THINKING IS THAT...

- WHEN WE ONLY FOCUS ON THE NOT YET ATTAINED, WE UNCONSCIOUSLY FEED THE MIND THE IDEA THAT WE ARE LACKING.

FIND YOUR OBJECTIVE AND SET YOUR PATH. MARK YOUR PROGRESS WITH ACKNOWLEDGEMENT AND CELEBRATION EVERY STEP OF THE WAY. FUEL YOUR JOURNEY WITH PASSION AND POSITIVE FEEDBACK.

IF YOUR LIFE IS WORTH CELEBRATING, ITS WORTH CELEBRATING NOW. WHAT IF THE AGREEMENT YOU MADE COMING IN TO THIS WORLD WAS TO NEVER COMPLAIN BECAUSE ALL YOU WILL EXPERIENCE IS A GIFT PUT HERE FOR YOUR DEVELOPMENT?

WHAT WOULD YOU DO NEXT, IF YOU KNEW THAT YOU COULD NOT FAIL?

HOW WOULD YOU CELEBRATE IT?

START NOW!

# 3 Budgets

There are only two kinds of people:

- 1) Those that create a lifestyle based on the amount of money they earn.
- 2) Those that create a business to produce the money that the owner's lifestyle requires.

I prefer the second approach and I hope you do too. Here's how to make it happen. First, change your mind that a budget restrains you and consider it a spending plan.

Next, determine the "3 Budgets" which are:

- 1) How much does it take to keep your office functioning without paying you?
- 2) How much do you need to fund your current lifestyle?
- 3) Dream about what you would have if you could "have it all." Consider your dream house, car(s), holidays, college funds, true wealth (defined as assets equal to or greater than 20 years of #2 above), and anything else you want including charity. Also include the tax consequence of being this productive.

Now you have a financial target to plan for!

Current Office Overhead/MO	_____
Current Personal Overhead/MO	_____
Dream Home Cost	_____
Actual Monthly Cost	_____
Dream Car(s) Monthly Cost	_____
Monthly Fun Fund	_____
Holiday Fund	_____
College Funds	_____
Monthly Cost	_____
Retirement Fund	_____
20 years of current Lifestyle	_____
Window to accumulate	_____
Monthly Cost to Fund	_____
Toys	_____
Charity	_____
Tax Consequences	_____
Other	_____
Other	_____
Other	_____
Other	_____
Total "Outflow"	_____
Currently Monthly "Inflow"	_____
The "GAP"	_____

How many MORE people are you willing to see? How many per hour? Your current capacity?

# STATISTICS

*THERE ARE TWO KINDS OF STATISTICS DOCTORS RARELY KEEP BUT PROVIDE VERY GOOD STRATEGIC INFORMATION YOU CAN USE TO KNOW WHEN AND HOW TO GROW YOUR BUSINESS.*

## □ *THE PRODUCTION SURVEY:*

- *MEASURE YOUR HOURLY PATIENT VOLUME OVER THE COURSE OF A TYPICAL WEEK.*
- *IF YOUR PRACTICE SHOWS THE MOST OFTEN SEEN TREND, YOU HAVE A TRINOMIAL DISTRIBUTION OF PEAK, NEAR PEAK AND SLACK TIMES IN YOUR SCHEDULE.*
- *MOST TRY TO BUILD UP THEIR SLACK TIMES BUT THIS IS LIKE WORKING ON YOUR WEAKNESSES. IT RARELY WORKS.*
- *FIND YOUR MOST PRODUCTIVE HOURS OF THE DAY AND FOCUS ON MAKING THEM MORE EFFICIENT.*

## □ *CUMULATIVE INCOME VS. CUMULATIVE EXPENSE:*

- *STARTING IN JANUARY PLOT YOUR MONTHLY INCOME VS. YOUR MONTHLY EXPENSE.*
- *ADD FEBRUARY'S DATA TO JANUARY'S AND PLOT THE CUMULATIVE INCOME VS. EXPENSE*
- *CONTINUE THROUGHOUT THE YEAR ON A MONTHLY BASIS.*
- *LOOK FOR THE DIVERGENCE WHEN CUMULATIVE INCOME EXCEEDS CUMULATIVE EXPENSE.*
- *DRIVE THE DIVERGENCE BY TAKING ON NO NEW MONTHLY OBLIGATIONS THUS DRIVING YOUR EXPENSE LINE DOWN.*
- *AND, ECONOMIZE YOUR ACTIONS AND BECOME MORE EFFICIENT IN DELIVERING YOUR PRODUCTS AND SERVICES TO DRIVE YOUR INCOME LINE UP.*



# Creating a Projection

**A projection is nothing more than the determination of the route connecting two points.**

**To establish a projection, you need to know**

- Where you are**
- Where you wish to go**
- How much time you're willing to spend getting from here to there**
- And, what you're willing to do to get from here to there**

**So, the first step is to determine where you wish to go. And then determine why you wish to go there. This is important because without a good why most people will not have the discipline to do what needs to be done in order to get where they say they want to go.**

**Most people create a lifestyle based on what their business produces.**

**A projection rooted with a firm why allows you to create a business that will fund the lifestyle of your dreams.**

**Where do you want to go?**

**Over what period of time?**

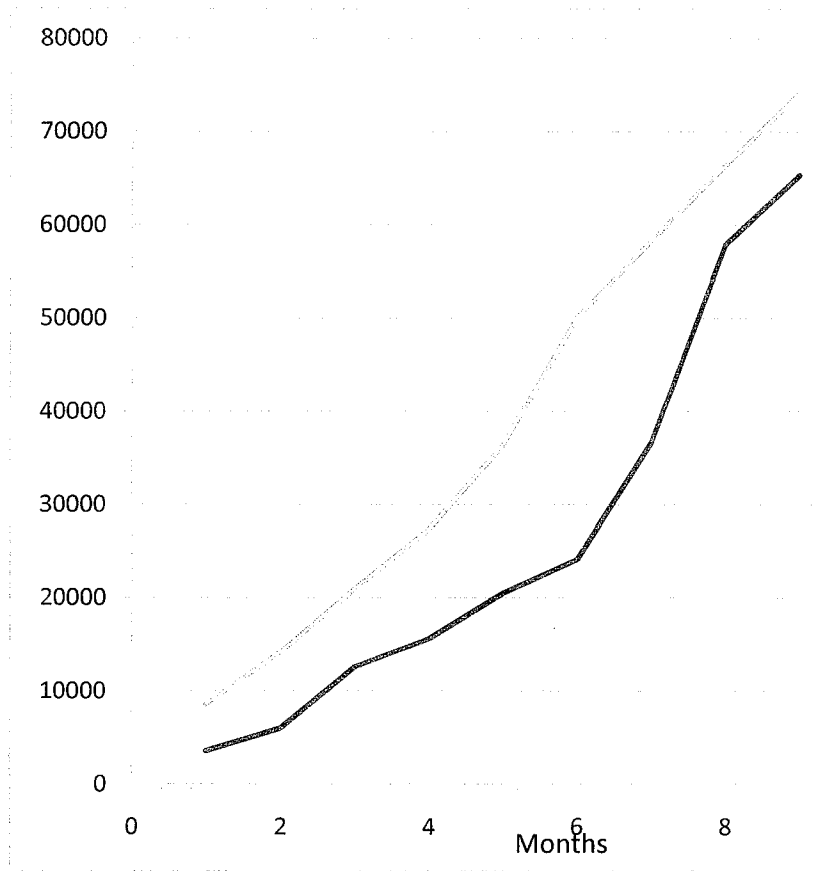
**What are you willing to do to get what you say you want?**

**A projection can be as simple as establishing the current trend in your business and extrapolating the line further into the future.**

**Or, you can create projections based on either a percentage increase over time or a flat increase month after month.**

**Given our previous example...let's say you wanted to add 250K/year to your practice and you were able to see 10 people an hour and were working a 30 patient contact hour week. That would mean that production would max out at 300 visits/week. If you were seeing 120 visits a week, that would mean that an additional 180 visits would have to generate the additional 250K/year. Is it possible or reasonable? Let's see:  $180 \text{ visits/week} = 45 \text{ families coming in for weekly wellness care}$  and those families would have to contribute  $\sim 20\text{K/month}$ .  $20,000/45 = \sim \$450/\text{month}$  for a family of 4. I say very do-able!**

Profit(BP)	Expense	Month	Cumulative Expense	Cumulative Income	Quick book
3568	8569.26	January	8569.26	3568	4935.14
2435	5628.39	February	14197.65	6003	4170.01
6589	6744.22	March	20941.87	12592	7230.25
3035	6427.3	April	27369.17	15627	6377.89
4874	8983.66	May	36352.83	20501	6990.29
3628	13794.17	June	50147	24129	950.27
12524	8122.59	July	58269.59	36653	277.5
21263	8152.29	August	66421.88	57916	15096.96
7429	7834.97	September	74256.85	65345	
		October			
		November			
		December			
Totals	65345 74256.85				46028.31



## Credit Application

Please initial each paragraph after you have read it. Thank you.

\_\_\_\_\_ In the event any insurance company obligated by contractual agreement to make payment to me or to you for the charges for a billing period, refuses to make such payment upon demand by you, or does not make payment within sixty (60) days of your billing, I will become personally responsible for that amount. I will have thirty (30) days to clear that account by calling my insurance company after being notified by your office. If the account is not cleared in thirty (30) days, I hereby authorize you to collect any outstanding amount on my credit card listed below.

\_\_\_\_\_ Any insurance checks that I receive I will promptly bring to the office. If I fail to do so within one week of receiving it, you may use my credit card listed below.

\_\_\_\_\_ If my insurance company fails to pay any portion of my bill, and I do not make payment within two weeks of your notifying me, please use my credit card listed below.

\_\_\_\_\_ Any cash balance that is on my account will be paid for and cleared within thirty (30) days of notification of the amount. If a balance remains past thirty (30) days, I hereby authorize you to collect that amount in full on the credit card.

**The signed credit card is for use only for services in the chiropractic office below. The doctor agrees not to add any charges directly to my account for services that were not performed or products not purchased.**

Patient's Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Credit Card:   Mastercard    Visa    Discover    American Express

Credit Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Patient's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Frequently Asked Questions:

## How is PCD different from other discount programs?

PCD's mission has always been to make quality healthcare available and affordable for everyone! Our company was founded in 1993 by chiropractors—for chiropractors and their patients! PCD is the nation's largest chiropractic patient advocacy organization and was designed specifically for our profession. While our focus is on increasing the chiropractic experience to patients, we also work hand-in-hand with our providers to offer professional resources to professionally increase your visibility in your community.

## Is PCD an insurance company?

No. PCD is a nationwide discount program that allows you to legally offer more affordable fees to your limited and non-insured patients, hardship and even maintenance or payment plan patients! PCD cannot be used in conjunction with any third-party payers.

## How much does it cost to be a PCD provider?

The PCD program is free of charge for participating providers.

## What type discount does PCD provide patients?

The discount we ensure patients is a minimum of 25% off of your regular fee. Flexible fee scheduling allows you to choose higher discounts if you like.

## Does the 25% reduced fee apply to x-rays, therapies and modalities?

Yes, it does. The fees may vary, but they must meet the 25% minimum. The 25% does not apply to products such as vitamins or pillows.

## Can we charge different PCD fees for patients?

Yes, in certain situations. Your normal PCD fees should be extended to all of your PCD patients and should be consistent in their application. However, you may offer different PCD fees to others so long as they are included in some type of special group, such as families, seniors, wellness care, etc. When creating special groups, be sure to remember that all individuals that qualify for group inclusion should be offered the respective group fee.

## How much is a PCD patient membership?

We don't charge our patients a monthly fee like other discount programs. We have an annual charge of only \$30 for Individual and \$45 for Family memberships.

## What is the cost for the PCD promotional materials?

All of the PCD patient materials you need in your office are free of charge and include patient membership cards, applications, brochures, notifications and postage-paid return envelopes for new enrollments.

## What happens after I enroll as a provider?

As soon as the PCD office receives your provider application, you will receive a welcome call confirming your enrollment. Your new PCD materials will be sent by priority mail and should arrive in 2-3 business days. Once you receive your materials and implementation manual, please schedule an implementation training session for you and your staff to go over the program at your convenience.

## Does PCD provide our office with marketing material?

Yes. We offer a variety of professionally-designed marketing materials created to increase your exposure in your community.

## What information is given during a referral to my office?

We offer the following (optional) info for referrals: Name, clinic location, rates, techniques, therapies, hours, website, etc. Ask for a Doctor Profile Worksheet to submit your referral information!

## Does PCD solicit new members for my office?

Yes. We run a continuous direct-mail campaign to consumers across the nation. As new patients respond, we refer them to our participating providers offering them the referral information from the PCD doctor profile.

## Does PCD share provider or patient information?

Absolutely not! PCD firmly believes that patient information should be respected and kept private. We do not share, rent or sell contact information with any other company. We hate junk mail too!

## If there are two providers in the same office, should we share a PCD provider number?

If the providers are husband and wife, it is normally best to share a provider number. If there are multiple doctors in a clinic that have certain patients they see and the CA keeps up with them separately, we advise you use a different PCD provider number for each doctor. This will help us keep the patient reports accurate for each doctor. Plus, if a doctor leaves the practice, he can easily migrate his patient base as well.

## Will I be included on PCD's national Doctor Locator service?

Yes. All actively participating PCD providers are included in our referral service. Your first PCD patient enrollment qualifies your account as "active."

## Can I use the PCD logo on my website?

Sure you can! Please contact our graphic department at [ginger@wellnessbound.com](mailto:ginger@wellnessbound.com) and ask for a PCD web-ready logo and link information.

## When can we expect to receive our quarterly patient report by mail?

March, June, September and December.

# Offering the PCD program to Patients:

## Who should I offer the PCD program to?

PCD is the perfect solution for patients with little or no insurance, high deductibles, maintenance care, hardship or any other occasion that calls for a reduced cash fee.

## Does PCD offer patient materials in Spanish?

Yes. We have enrollment forms and brochures printed in Spanish, but are special order items. Please call our office and let us know if you need these items in your office.

## How can I keep up with the patients that enroll?

Feel free to call and go over your account anytime! We also provide quarterly reports and online provider login reports at [www.bewell2.com](http://www.bewell2.com). We do ask that you utilize the patient list form we provide you with each set of corresponding patient cards. You simply write the name of the patient in the blank next to the card number you issued them. This patient list is also required for reorders.

## Will I accept payments made to PCD in my office?

Yes! We have a simple and effective solution for making PCD available immediately! We provide enrollment materials and postage-paid return envelopes for your office. Simply return as many new enrollments in a single return envelope as possible and mail those in to PCD once a week. You can also enroll new patients immediately online at [www.bewell2.com](http://www.bewell2.com).

## Should we run patient enrollment fees on our credit card machine and then cut PCD a check?

No, that's not necessary. We process the credit card payments here at PCD.

## What happens when I run out of cards for patients?

When your supplies are running low, fax your patient list and the re-order form to our office. This will prompt us to mail out your next set of corresponding materials.

## Can we offer PCD to patients with insurance?

Yes. A patient can choose NOT to utilize insurance or they can use their insurance until the benefits are exhausted and then use PCD. But, a patient cannot use their insurance in conjunction with PCD.

## Can patients apply PCD fees toward their deductible?

No. PCD is void in conjunction with third-party payers.

## If we're having a special promotion, can we get more materials than the regular set of twenty?

Sure! Just call and let us know what's going on and we'll send enough printed PCD materials to cover your event.

## Can a patient that was in an auto accident put their PCD membership on hold?

PCD accounts automatically suspend while third-party billing occurs. At the conclusion of treatment for a Personal Injury, PCD automatically reinstates. Notify PCD of these changes. Membership will not be pro-rated.

## What qualifies as a "family" membership?

Family membership includes the patient, their spouse and children under the age of 21 or enrolled in school. Special circumstances allowed for caregivers, guardians, etc.

## Can a minor patient be a PCD individual member account holder?

Yes, just put the minor's name in the contact information and the parent's name in the payment area. Make a note on the bottom of the enrollment letting us know that the patient is a minor and have the parent sign the form.

## Is a patient's annual membership effective from the date they enroll or for a calendar year?

PCD patient membership begins immediately on the day the patient enrolls and expires on the same day of the following year, unless renewed.

## Can family members NOT living in the same household be on the same PCD plan?

No, unless the family member is a child under 21 or enrolled in school.

## What happens if a patient's PCD payment doesn't clear the bank or process correctly?

Several attempts are made to contact the patient to make payment arrangements. If the patient doesn't respond, the provider must bill the patient their regular fee.

## Can we help patients transfer their PCD membership if they move?

Yes. The patients PCD membership is valid with any participating provider across the nation. You can let the patient know about the doctor locator service online.

## What happens if we lose a membership card?

Cards have a value of \$30, so please keep them in a safe place and never send cards home with applicants who haven't paid yet. If you do misplace or damage a card, call PCD to void that card number.

## What if a patient tries to file PCD visits with insurance?

We recommend you do not assign insurance billing codes to PCD visits. Create a unique code for your PCD patients so that if you release a patient record, they still will not be able to file an improper claim.

## What should we do if a new patient comes to our office and is already a PCD member?

If the patient is transferring to your office, have them complete an enrollment form and give them your next available card number. Make a note on the form that the patient is transferring from whatever their old number is. Be sure that you keep the original expiration date that appears on their previous card, or call our office.

## Can a PCD patient get a membership refund?

All patient fees paid to PCD are strictly non-refundable, except as provided by law. PCD does not pro-rate unused membership time if cancelled before the expiration date.

## Can we give a greater discount for multi-family members coming in on the same day?

Yes. Your PCD fees are flexible to meet the needs of your patients! We guarantee patients receive the 25% discount, but you can give a greater discount if you like.

## If a patient comes to us and says they are a PCD member, how can I find out for sure?

You can always ask to see their PCD membership card. If they don't have their card, you can call our office to verify their membership.

## ENROLL TODAY

or Call (800) BE WELL 2 (239-3552)  
or sign up online at [www.bewell2.com](http://www.bewell2.com).  
(Be sure to note your referral select as Steve Hoffman!)



*GROUP SESSION*  
*MARKETING AND MORE*

# YOUR MARKETING PLAN

## 1. TARGET MARKET

### A. PRIMARY:

I. DEMOGRAPHICS:

II. PSYCHOGRAPHICS:

### B. SECONDARY MARKETS:

## 2. THE MESSAGE: THE PROBLEM MY PRODUCT SOLVES IS...

### A. DESCRIBE YOUR BUSINESS: IMAGE AND APPEARANCE:

### B. YOUR MESSAGE:

I. HEADLINE:

II. SUBHEAD:

III. PRIMARY USP:

IV. STORY (BEHIND THE BUSINESS OR MYSELF):

V. FEATURES AND BENEFITS:

VI. CALL TO ACTION:

## 3. MARKETING PLAN:

### A. JOINT VENTURE PARTNERS:

### B. REFERRAL SYSTEM:

### C. ONGOING DATABASE MARKETING SYSTEM:

### D. UPSOLLS/DOWNSOLLS:

### E. BACK END PRODUCTS AND SERVICES:

### F. PACKAGES/BUNDLES

### G. CONTINUITY PROGRAMS:

### H. FREQUENT BUYER PROGRAM:

### I. PUBLICITY RELEASE:

### J. 5 INTERVIEW QUESTIONS:

### K. ONLINE MARKETING STRATEGIES

ACTION: WHAT ARE THE FIRST 3 ACTIONS I WILL TAKE AND BY WHEN?

## THE SIMPLE STEPS MARKETING PLAN:

### EVERY STEP FILLS THE GAP

STEP 1: HOW MANY MORE NEW PATIENTS WILL IT TAKE TO CLOSE THE GAP BETWEEN WHERE YOU ARE AND WHERE YOU WANT TO BE?

STEP 2: DETERMINE 3 APPROACHES TO MARKETING EACH OF WHICH COULD CLOSE THE GAP BY ITSELF:

IMMEDIATE RETURN. SHORT TERM. A MARKETING EXPENSE.

INTERMEDIATE RETURN. LONGER TERM. DONE INTERNALLY.

ALMOST NO IMMEDIATE RETURN. LONG TERM. AN INVESTMENT

### EXAMPLES OF EACH:

IMMEDIATE: TALKS, SCREENINGS, EVENTS, ADS. YOU DO THEM AND YOU GET A RETURN. AND THEN MUST DO THEM AGAIN TO GET ANOTHER RETURN.

DO SUFFICIENT PROGRAMS TO GET THE RETURN YOU WANT. IF YOU NEED 12 MORE NEW PATIENTS A MONTH AND YOU AVERAGE 4 NEW PATIENTS EVERY TIME YOU SPEAK TO A GROUP OF 10-12 PEOPLE...YOU WILL NEED TO DO 3 OF THESE A MONTH TO GUARANTEE YOU GET THERE.

INTERMEDIATE WOULD BE HAVING AND EMPLOYING A CONVERSION STRATEGY TO PRODUCE FAMILIES WITHIN THE PRACTICE. IF YOU KNEW THAT CONVERTING ONE FAMILY A WEEK WOULD GIVE YOU THE 12 NEW PATIENTS YOU NEEDED, THAT WOULD ALSO, BY ITSELF, CLOSE THE GAP.

LONG TERM WOULD BE CREATING ONE ALLIANCE WITH ANOTHER BUSINESS PER MONTH FOR A YEAR. AT THE END OF THE YEAR, IF EACH ALLIANCE MEMBER ONLY SENT YOU ONE REFERRAL A MONTH, THE GAME IS OVER AND YOU...AND THE PATIENTS, WIN!!!

STEP 3: HAVE AN AUTOMATED LEAD FOLLOW-UP SYSTEM WHICH WILL, IF EMPLOYED, WILL EFFECTIVELY DOUBLE THE RESULTS OF YOUR MARKETING OVER TIME. WE RECOMMEND 2NDCOUSIN'S 'THE SYSTEM' - SEE RESOURCES



# 5 MARKETING/INTERVIEW QUESTIONS

1. HOW DID YOU GET STARTED IN THIS BUSINESS?
2. WHAT DO YOU LOVE MOST ABOUT WHAT YOU DO?
3. WHAT PROBLEM DO YOU SOLVE FOR YOUR CLIENTS?
  1. FROM THEIR POINT OF VIEW
  2. CONVERT FEATURES TO BENEFITS
  3. WHAT'S SO GOOD ABOUT THAT?
4. WHY SHOULD THEY SEEK SOLUTIONS FROM YOU?
  1. THEY HEARD SOMETHING GOOD ABOUT YOU
  2. THEY'VE RECEIVED NO HELP FROM TRADITIONAL SOURCES
5. HOW CAN I TELL IF SOMEONE I KNOW WOULD BENEFIT FROM WHAT YOU DO?
  1. BACK PROBLEMS
  2. HEALTH PROBLEMS
  3. IMPROVE QUALITY OF THEIR LIFE/HAPPIER AND MORE PRODUCTIVE

DON'T FOR SOMEONE TO ASK YOU.

BECOME A REFERRAL FUNNEL: ASK THEM

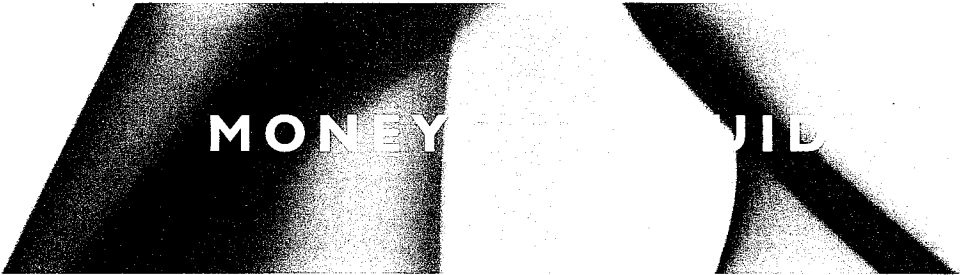
**DR. ALAN WEINSTEIN**

**CONTENT GROWS YOUR MARKET SHARE**





# *SIMPLIFYING MONEY*



**QUESTION ONE:**

\_\_\_\_\_ percent or more of income is leaking due to the \_\_\_\_\_ tax.

List three areas where you may be leaking money:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*(could be tax, poor credit increasing interest and insurance rates, improper corporate structure or not having a business, investment expenses, lack of knowledge around right opportunities, undefined financial blueprint, etc.)*

**QUESTION TWO:**

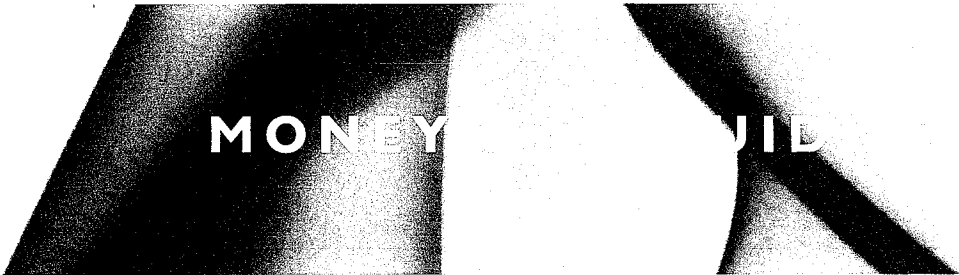
\_\_\_\_\_ percent of people have an error on their credit report. \_\_\_\_\_ percent of those that have an error do not qualify for a loan that otherwise would have if the report was accurate.

- A. What is your Credit Score? \_\_\_\_\_
- B. How can you monitor your credit score? \_\_\_\_\_
- C. How can you tell if you have an error on your credit report? \_\_\_\_\_
- D. Where might a bad credit score hurt you or even a good credit score not be good enough? \_\_\_\_\_

**QUESTION THREE:**

When one can \_\_\_\_\_ tax there is a new resources and rewards. When one \_\_\_\_\_ tax they go to jail!

- A. What areas can you save tax? *(name at least one)* \_\_\_\_\_



**QUESTION FOUR:**

There are several types of corporations, but the majority of corporations fall into \_\_\_\_\_ categories. These corporations are \_\_\_\_\_, \_\_\_\_\_.

A. If you are looking to build your business and sell, what is typically the best type of company? \_\_\_\_\_

B. If you are looking to make your company a cash cow and take as much income as possible, what is the preferred type of corporation?

a. You can take a \_\_\_\_\_ and then pay out \_\_\_\_\_ in order to eliminate unnecessary self-employment tax.

C. If you want flexibility or have a partnership, what type of corporation could be best? \_\_\_\_\_

**QUESTION FIVE:**

In order to pay off debt quickly, you should ignore the \_\_\_\_\_ and determine the \_\_\_\_\_

A. Which one of your debts has the lowest cash flow index? \_\_\_\_\_



**QUESTION SIX:**

The magic word to get to the right department for any credit card company where you can lower your interest rates is \_\_\_\_\_.

What one action can you take to improve your interest rates? \_\_\_\_\_

\_\_\_\_\_

**QUESTION SEVEN:**

An investment should benefit you \_\_\_\_\_ and in the \_\_\_\_\_.

What is one way you can improve your Qualified Plan options? (keoghs, RSP's, IRA's, 401 (K) etc) \_\_\_\_\_

\_\_\_\_\_

**QUESTION EIGHT:**

Insurance is meant to handle \_\_\_\_\_ events.

What is one idea you can implement to improve your coverage without increasing your expense? \_\_\_\_\_

\_\_\_\_\_

**QUESTION NINE:**

The key to wealth is \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_





*TOMORROW'S  
COMMUNICATIONS  
TECHNOLOGY*





*SALES*

*PRODUCTION*

*QUALITY CONTROL*

## THE IDEAL PRACTICE MEMBER

THE IDEAL PRACTICE MEMBER WOULD BE OPEN TO NEW IDEAS, WILLING TO LEARN, AND HAVE A LOVE FOR LIFE. THE MEMBER WOULD RESPECT ALL, AND NOT JUDGE ANYONE, ESPECIALLY THEMSELVES. THE MEMBER WOULD UNDERSTAND THAT HEALING COMES FROM WITHIN, AND NOT FROM AN OUTSIDE SOURCE LIKE DRUGS OR SURGERY. THE MEMBER WOULD EMBRACE THEIR LIFE FORCE, THEIR SPIRIT, THEIR INNATE, THEIR SOUL. THE MEMBER WOULD UNDERSTAND THAT THEIR BODY IS A PHYSICAL MANIFESTATION OF THEIR SPIRIT. THEIR BODY IS A TEMPLE OF THEIR CREATOR, AND WOULD BE TREATED ACCORDINGLY. THE MEMBER WOULD KNOW FORGIVENESS, PATIENCE, AND THE POWER OF A POSITIVE ATTITUDE. THE MEMBER WOULD LEARN FROM THEIR MISTAKES AND KNOW THAT A DIFFERENT PATH MUST BE TRAVELED IN ORDER TO RESTORE AND MAINTAIN THEIR PROPER LIFE FORCE. THE MEMBER WOULD UNDERSTAND THAT IF THEIR LIFE FORCE IS BEING INTERFERED WITH, THEY ARE EXPRESSING LESS THAN 100% LIFE, AND THIS WOULD NOT BE ACCEPTABLE. THEY WOULD DO WHATEVER IT TAKES TO RESTORE PROPER LIFE FORCE, INCLUDING LIFESTYLE CHANGES, AND ESPECIALLY ADJUSTMENTS TO REMOVE THE INTERFERENCE. THE MEMBER WOULD KNOW THAT HEALING IS INSTANTANEOUS, BUT TIME AND MATTER ARE LIMITATIONS IN RESTORING PHYSICAL HEALTH. THE MEMBER WOULD ALSO KNOW THERE IS SO MUCH MORE TO BEING HEALTHY THAN JUST PHYSICAL HEALTH. HEALTH IS A STATE OF COMPLETE (NOT PERFECT) MENTAL, PHYSICAL, SPIRITUAL, AND SOCIAL WELL-BEING. I WOULD REMOVE THE INTERFERENCE WITH MY SKILL, WHILE SHOWING LOVE, RESPECT, AND COMPASSION FOR ALL MEMBERS. I WILL TREAT ALL MEMBERS AS INDIVIDUALS AND DO WHATEVER IT TAKES TO RESTORE THEIR LIFE FORCE TO 100%. THIS IS WHAT I HAVE TO OFFER. AND THROUGH ALL OF THIS THAT I OFFER THEM, THEY WOULD REWARD ME WITH ABUNDANCE. THIS WOULD INCLUDE LOVE, RESPECT, ACTS OF GRATITUDE, AND MONETARY DONATIONS. THEY WOULD REWARD ME WITH ABUNDANCE BECAUSE THERE IS NO EQUAL EXCHANGE FOR RECONNECTING MAN-SPIRITUAL WITH MAN-PHYSICAL AND RESTORING ONE'S LIFE FORCE. THE LIFE FORCE THAT IS THE MIRACLE WE WERE GIVEN AT CONCEPTION; THAT ONLY KNOWS PERFECTION; THAT ONLY KNOWS PEACE, LOVE, JOY, HARMONY, AND HEALING. MY SPIRIT SERVES AS AN ANTENNA TO ATTRACT THOSE WHO DESIRE A GREATER, MORE FULFILLING EXPRESSION OF LIFE; THE IDEAL PRACTICE MEMBER.

MY IDEAL PRACTICE MEMBER

OUR IDEAL PRACTICE MEMBER IS A YOGA-MOM.

DRS. IAN AND LINDSAY HOFFMAN

Make a list of characteristics associated with “ideal” patients in your office like:

1. People I enjoy the most
2. People who have referred
3. People who are bringing their families in
4. People who have been with me the longest
5. People who “get it”
6. People who have stayed in care beyond their symptoms
7. People who have discretionary income that they are happy to share with me
8. People who value my time and talent
9. \_\_\_\_\_
10. \_\_\_\_\_

Next, make a list of 3-6 people for each category knowing that some people will appear on the list once and others may appear multiple times in multiple categories. Compile the list and flag each file with a post-it note with numbers 1 and 2 on the note. On their next visit to the office, after their adjustment, open a conversation with them:

Ben, now that I’ve adjusted you today, do you have a moment to talk?

Karen and I have been discussing the patients in the practice that we enjoy the most and you’re one of them. We want the practice to grow, of course, but we want it to grow with people like you. We want to make sure that your visit to the office is so good for you that you view your visit with us as one of the most important things you do for yourself each week so is there anything that you could recommend that we could do that would make your visit with us **EVEN BETTER** than it already is?

Answers will include:

1. Can’t think of anything. Ask them to please think about it and you will ask them again next time (circle the 1 on the flag)
2. Everything is great just the way it is. Ask them what they like best about their visit
3. They will make a suggestion. Write it down.
4. They will make a joke about it. Write it down anyway.

Next question: Do you recall what you needed you find out or experience that changed you from someone who first consulted us to get rid of \_\_\_\_\_ (their health complaint) to someone who became \_\_\_\_\_ (their category or categories of ideal patient above)?

Answers will include:

1. Don’t know. Ask them to think about it and you will ask them again on their next visit (circle 2 on the flag)
2. When you said..... Write it down.
3. When I experienced.... Write it down.

This is the start of a process that will allow you to find out what you are already doing right so we can build an education system around your strengths to develop the kind of practice that you want.



# What, Why, How, Love And the Visit Template

A classic retailing strategy is the “what, why, how, love” strategy. In a visit template, this strategy might look like:

1. What I found examining you today is...
2. Why this is important to your health is...
3. How you will be now that I’ve corrected it is...
4. And if we can keep it corrected, you will love it.

It can also be used for retailing other products and services but I find its main application is within the visit template:

## Look at Focus

Purpose is situational  
conscious or unconscious?  
Awesome greeting  
Ed points  
On their exit  
On them

## INTENT:

Synchronize intent=  
a greater connection=  
formulate agreements

## One Thing

3 words to describe what you are experiencing or want to experience,  
what you want to accomplish today

Paying it forward...reinforcing the win

ADD story

# SATISFACTION SURVEY

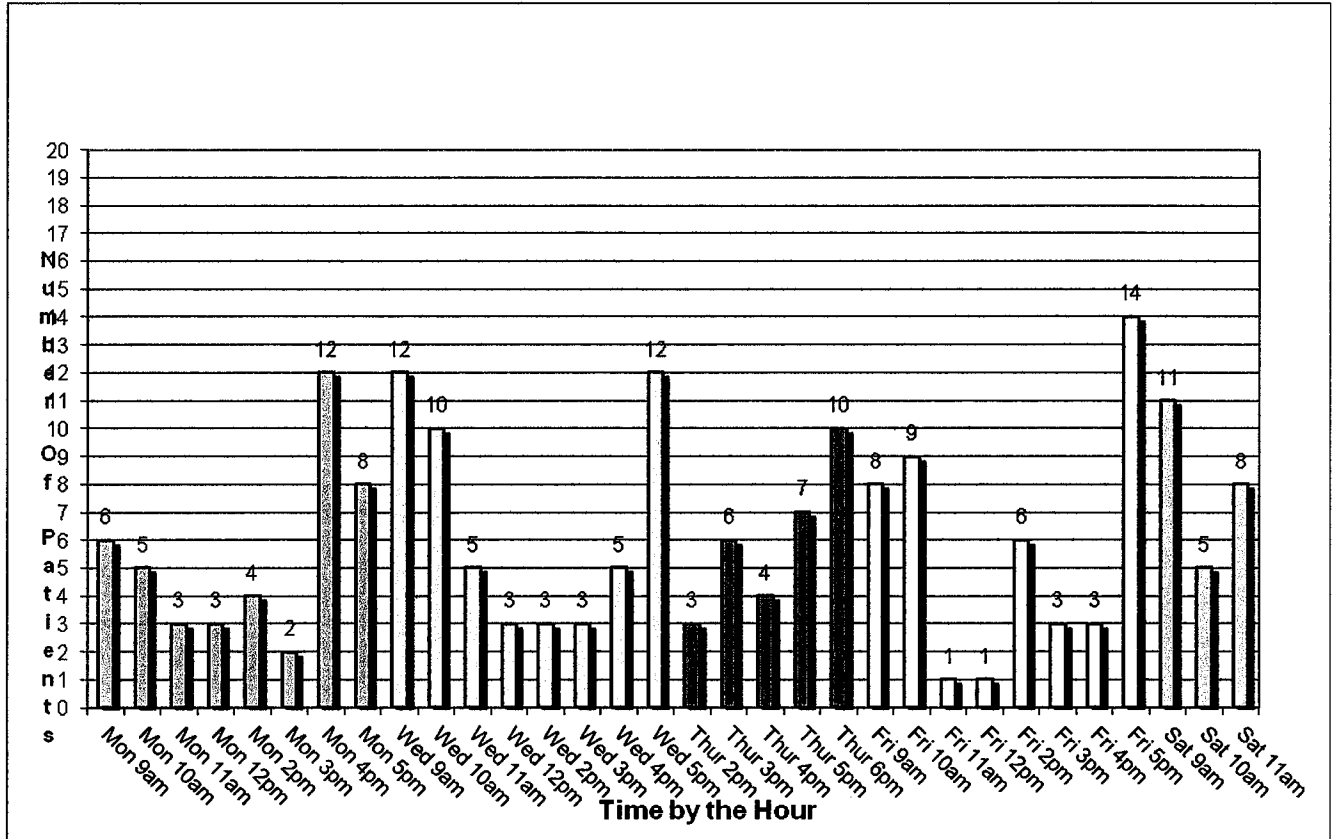
THIS PRACTICE HAS GROWN AS A RESULT OF MANY FACTORS INCLUDING GREAT PATIENT RESULTS IN A FAMILY ORIENTED HEALING ATMOSPHERE. IT HAS ALSO GROWN LARGELY AS A RESULT OF PATIENT REFERRALS AND HAVING WONDERFUL PRACTICE MEMBERS LIKE YOU.

IN OUR EFFORT TO INSURE YOUR EXPERIENCE IN OUR OFFICE IS A WONDERFUL EXPERIENCE FOR YOU AND YOUR FAMILY, WOULD YOU KINDLY HELP US BY COMPLETING THIS BRIEF SURVEY:

- 1) WHICH DAY OF THE WEEK IS THE **MOST** CONVENIENT DAY FOR YOU TO HAVE YOUR APPOINTMENT WITH US? \_\_\_\_\_
- 2) WHICH DAY OF THE WEEK IS THE **LEAST** CONVENIENT DAY FOR YOU TO HAVE YOUR APPOINTMENT WITH US? \_\_\_\_\_
- 3) WHICH TIME OF THE DAY IS THE **MOST** CONVENIENT TIME FOR YOU TO HAVE YOUR APPOINTMENT WITH US? \_\_\_\_\_
- 4) WHICH TIME OF THE DAY IS THE **LEAST** CONVENIENT TIME FOR YOU TO HAVE YOUR APPOINTMENT WITH US? \_\_\_\_\_
- 5) WHAT **ONE** THING DO YOU LIKE **MOST** ABOUT OUR OFFICE?  
\_\_\_\_\_
- 6) WHAT IS THE **ONE** THING YOU WOULD RECOMMEND FOR US TO DO THAT WOULD MAKE YOUR VISIT TO THE OFFICE **EVEN BETTER** FOR YOU THAN IT ALREADY IS?  
\_\_\_\_\_
- 7) WHAT WAS THE **ONE** THING ABOUT HEALTH THAT YOU FOUND OUT HERE THAT HAS CONTRIBUTED MOST TO YOUR HEALTH AND WELL-BEING?  
\_\_\_\_\_
- 8) WHAT WAS THE **ONE** THING THE DOCTOR SAID THAT HAS STUCK WITH YOU?  
\_\_\_\_\_
- 9) HOW HAS YOUR HEALTH IMPROVED SINCE STARTING CHIROPRACTIC CARE HERE?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

THANKS FOR TAKING THE TIME TO HELP US HELP YOU!

# PRODUCTION SURVEY



# QUALITY CONTROL

## PRINCIPLE PURPOSE OF POSITION;

1. CLIENT COMPLAINTS ARE SWIFTLY HANDLED TO THEIR SATISFACTION.
2. DEPARTMENT SYSTEMS EFFECTIVE.
3. STAFF MEMBERS COMPETENT ON JOBS.

## MONTHLY QUALITY CONTROL STATISTIC SHEET

HAS REFERRED	PATIENT LESS THAN 3 MONTHS
PATIENT MORE THAN 9 MONTHS	PATIENT FROM 3-9 MONTHS

SUMMARY FOR THE MONTH OF \_\_\_\_\_ . COMPLETED BY \_\_\_\_\_

	THIS MONTH	LAST MONTH
% REFER	_____	_____
% < 3 Mo.	_____	_____
% 3-9 Mo.	_____	_____
% > 9 Mo.	_____	_____

# QUALITY CONTROL

## PRINCIPLE PURPOSE OF POSITION:

1. CLIENT COMPLAINTS ARE SWIFTLY HANDLED TO THEIR SATISFACTION.
2. DEPARTMENT SYSTEMS EFFECTIVE.
3. STAFF MEMBERS COMPETENT ON JOBS.

## MONTHLY QUALITY CONTROL STATISTIC SHEET

HAS REFERRED	PATIENT LESS THAN 3 MONTHS
PATIENT MORE THAN 9 MONTHS	PATIENT FROM 3-9 MONTHS

SUMMARY FOR THE MONTH OF \_\_\_\_\_ . COMPLETED BY \_\_\_\_\_

	THIS MONTH	LAST MONTH
% REFER	___52___	___45___
% < 3 Mo.	___10___	___14___
% 3-9 Mo.	___15___	___10___
% > 9 Mo.	___75___	___77___

Personal Analysis:

This questionnaire is for you to focus on specific areas regarding your personal dreams for your life situations.

Instructions:

We have listed several possible objectives on the left side of the page (feel free to add your own). Please circle the corresponding number which best represents the importance that that objective has in your life (0 is low importance, 5 is highest importance). On the right, fill in what percentage (0-100%) you are currently experiencing.

<b>Objectives</b>						<b>Percentage</b>	
Healthy body	0	1	2	3	4	5	
Vitality	0	1	2	3	4	5	
Comfortable home	0	1	2	3	4	5	
Comfortable standard of living	0	1	2	3	4	5	
Fulfilling work/career	0	1	2	3	4	5	
Financial prosperity	0	1	2	3	4	5	
Fulfilling leisure-time activities	0	1	2	3	4	5	
Satisfying relationship with life partner	0	1	2	3	4	5	
Satisfying relationship with children	0	1	2	3	4	5	
Satisfying relationship with family	0	1	2	3	4	5	
Satisfying relationship with colleagues	0	1	2	3	4	5	
Community service/involvement	0	1	2	3	4	5	
Expanding spiritual awareness	0	1	2	3	4	5	
Expanding personal fulfillment	0	1	2	3	4	5	
Free from worry	0	1	2	3	4	5	
Free from compulsion	0	1	2	3	4	5	
Ability to make decisions	0	1	2	3	4	5	
Ability to experience change	0	1	2	3	4	5	
Ability to see solutions	0	1	2	3	4	5	
Having fun	0	1	2	3	4	5	
Other _____	0	1	2	3	4	5	
Other _____	0	1	2	3	4	5	
Other _____	0	1	2	3	4	5	
Other _____	0	1	2	3	4	5	







*CLOSING REMARKS AND  
RESOURCES*

# WELLNESS BUSINESS IS A PRE-REQUISITE TO A WELLNESS PRACTICE

If you could design your practice to be anything you wanted it to be, exactly what would it look like? Most would choose a wellness practice that is family based with highly informed and cooperative practice members who view their visit to the office as the most important thing they do for themselves and their family every week.

How would you benefit from creating a wellness practice? How you benefit must be crystal clear to you because it creates the tension that will pull you to do what needs to be done so that you can have what you really want to have.

Symptom based practices are stressful, unpredictable and not going in the direction you had dreamed it would. Patients are fixated on their symptoms, complain, rarely refer, comply or stay long enough to get the real benefits chiropractic offers. The patient has been unconscious about their health and it shows.

Wellness practices are exciting and fun. Patients understand chiropractic as a lifestyle. They value you and the service you perform and are conscious about developing their health potential and their family's health potential for a lifetime.

Just as there are two types of practices, there are two types of businesses. A symptom based business doesn't know where it was, where it is or where it is going. It's a stressful scramble to pay bills while being unable to predict where the money will come from. It's being as unconscious about your business as your patients have been about their health. A wellness based business, like a wellness based practice, is exciting and fun because you are creating it the way you want it. You know what your business needs to produce and you have created a business development program to assure you get where you want to go. It involves a conscious emphasis on developing the health of your business. ***A wellness practice must be built upon a wellness business.***

You simply can't effectively sell something that you don't own...no more than you can effectively sell something that you, yourself, could not afford. Simple rules.

Let your business be the right example for your practice and your practice members.

What if you had a one-day annual health planning seminar in your office for your practice members that are most interested in being at cause of their health instead of being at effect of their lack of vision, skills, motivation, resources and action plan?

Think about it!



# CLOSING THOUGHTS FOR AMPS 2012

WHEN IT COMES TO MONEY...

THERE ARE ONLY TWO TYPES OF PEOPLE

THOSE THAT CREATE A LIFESTYLE BASED  
ON WHAT THEY EARN AND...

THOSE THAT CREATE A BUSINESS THAT  
AFFORDS THEM THE LIFESTYLE THEY  
WANT.

WHICH HAVE YOU BEEN?

WHICH WILL YOU BE?

GO FORTH AND SERVE!

DR. STEVE

*PLANNING SEMINAR*

*RESOURCES*

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*AUTHORS RICH CHRISTIANSEN, MICHAEL DREW, KEITH LEON, AND GARRETT GUNDERSON*

*FOR MORE INFORMATION ABOUT ANY OF THESE COMPANIES OR INDIVIDUALS, PLEASE MAKE SURE YOU VISIT THEM ON THE BREAKS IF THEY ARE HERE AND FEEL FREE TO CONTACT THEM.*

*I AM HAPPY TO MAKE PERSONAL INTRODUCTIONS FOR YOU...SIMPLY EMAIL ME AT DRSTEVE@DRSTEVEHOFFMAN.COM*

*AND REMEMBER...INFORMATION AND RESOURCES ARE USELESS TO YOU WITHOUT ACTION ON YOUR PART!*



Hey Everybody,

Dr. Randi of Community Wellness Day here- sorry I couldn't be there with you this year in person for Dr. Steve's annual planning seminar to share some really important information.

Because of the work I do I often find myself meeting with people that many chiropractors don't often meet with. The reason I tell you that is because there are things going on right under our nose that 99% of our profession has no idea of. This is critical information to understand what is going on around us before its too late.

Please take a minute to read the info below. I'm telling you this is just one example of things I have recently learned that dropped my jaw while with a board member when they shared what their corporation is now doing.

Yours in success,  
Dr. Randi I Ross

#### If You Don't Do This Your Area Hospital Will

Did you know that hospitals are now marketing their department heads to come to you group, company, place of business and organization to speak on topic specific health issues? Do you realize what this means? All of us(chiropractors) that are trying to educate the community on how to get and stay healthy are now finding themselves with the additional challenge of competing with these huge corporate institutions called hospitals. They have marketing power and community positioning that it is impossible to compete with.

Their community relations directors are calling the same companies/groups that you are, providing lunch & learn and corporate wellness programs. They are and offering their department head listed in New York magazine as the best 100 doctors in NY, NJ or wherever you are will be coming to speak to their group on their specialty including health & wellness, diet, nutrition, weight loss, women's health issues, diabecity, heart disease prevention and on and on. So who do you think is getting in that company, the premiere hospital in the area with the doctor on the cover of a prominent magazine or the doctor of chiropractic? If you/we don't begin to position ourselves in our communities as that source of health and wellness everyone else will.

But there is something that we can do to assure that doesn't happen in our own towns. Right now we need to be doing something Big, something so Big that dozens of companies and dozens of local government agencies and schools and professionals and so many more in your town will know You, and will want You to bring your information to their group or team. Position yourself so everyone in your community knows your name and what you do. Why will they want you, because they will get a chance to build a relationship with you, they will be impressed with you, they will trust you, they will embrace your knowledge and want to hear what you have to offer. But the ONLY way to achieve that is to do something really Big and stand out in your community.

That's where we come in. Community Wellness Day is the only program in the profession that's Big, and can be done by anyone. All you have to simply have is a desire to be the one that does something Big in your town. Be the one that wants to stand out, and as the old Cheers song says be the one that "Everybody knows your name." We will hold your hand and walk you through the process and show you how to host the biggest event your town has ever seen and position yourself as the doctor that gets:

"40 pre-paid NP's not counting the few dozen schedule by following the post event coaching". *Dr. Worob*

"The 1st Community Wellness Day I did there was 1200 people, the 2nd nearly 4000 showed up." *Dr. M. Davis*

"Community Wellness Day has got me from doing 8 workshops per year to 56 workshops per year, and the best part is people call me, I don't call them anymore!" *Dr. A. Macioce*

"Over \$200,000 in new revenue with 50 New Patients scheduled at my Community Wellness Day and counting" *Dr. Sahoury*

Now you can try to achieve this on your own, notice I said try; but why on gods earth would you want to? We have done the work for you, we know what works and what doesn't. We know how to train you to be successful so it will be you not the local hospital that is the source of health and wellness for your community. All you simply have to do is follow directions and reap the rewards of doing the one Big thing that all chiropractors can do, host a Community Wellness Day in your town; and as a bonus we will be showing you how to do it at no cost, that's right no cost.

We will be hosting a number of online meetings during the week of December 4th 2012 (so no excuse that you don't have time) exclusively for those attendees of the Dr. Steve's Annual Management Planning Seminar.

**Enter this link for your special access to these exclusive online meetings**

**<http://tinyurl.com/drstevehoffman>**



YOU'RE SO GOOD  
AT GIVING...

HOW GOOD ARE  
YOU AT RECEIVING?

IT'S IMPORTANT TO  
ME TO CONTRIBUTE  
TO YOU...

NAME YOUR OWN  
PRICE...



*SPECIAL*  
*THE CASH FLOW CAMP*  
*EXPERIENCE*

# Creating Profitable Outcomes In Your Business

**Brandon Allen**

**[brandon@thebizblueprint.com](mailto:brandon@thebizblueprint.com)**

Everyone who owns a business cares, at some level, about their cash flow and profitability. While money isn't everything in your business or your life, the absence of profit in your business keeps you from delivering the value that you want to create for your patients long term.

To start, let's assess where you are at with regards to your relationship with the money in your business:

1. How often do you review your profit and loss and balance sheet?
2. If you review it regularly, what do you do with the information?
3. Do you create a business budget for your practice at the beginning of each year? (In the business world this is called a pro-forma)
4. Do you put money away in a business savings account on a monthly basis?  
If not, why?

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# What You Should Know About Accounting

**Profit and Loss-**A financial statement that summarizes the revenues, costs and expenses incurred during a specific period of time.

**Balance Sheet-** A financial statement that summarizes a company's assets, liabilities and shareholders' equity at a specific point in time

**Cost of Goods Sold or Cost of Services Sold-** The direct costs attributable to the production of the goods sold by a company. This amount includes the cost of the materials used in creating the good along with the direct labor costs used to produce the good.

**Fixed or Indirect Cost:** Business expenses that stay constant regardless of how many patients you see. For instance, rent expense.

**Variable or Direct Cost:** Business expenses that fluctuate based on the amount of patients that are seen. An example of this would be certain doctors expenses and materials that are relevant to patient care.

**Cash Accounting:** An accounting method where receipts are recorded during the period they are received, and the expenses in the period in which they are actually paid.

**Accrual Accounting:** An accounting method that measures the performance and position of a company by recognizing economic events regardless of when cash transactions occur. The general idea is that economic events are recognized by matching revenues to expenses (the matching principle) at the time in which the transaction occurs rather than when payment is made (or received). This method allows the current cash inflows/outflows to be combined with future expected cash inflows/outflows to give a more accurate picture of a company's current financial condition.

## What Areas You Are Leaking Cash

There are a lot of things to worry about in a business. Our accounting is typically one of the things that gets put on the back burner. Because of this lack of attention to accounting, you tend to leak cash in your business and not even realize you are doing it.

You aren't going to learn everything you need to learn about accounting but I am going to give two huge areas to look at in your business.

### Margins:

1. Do you know all of the gross profit margins in your business for each product and service that you sell? Is this represented on your income statement?
2. Knowing margins helps you calculate how much you should pay associates and other contractors as well as determine how to price services.
3. Margins also help you determine the appropriate discounts.

Know The Numbers: The numbers you are about to see aren't hard and fast for every office but should give you a good idea of where you need to be in your practice and what's reasonable from a cash flow standpoint.

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## Expense Breakdown:

Net Profit	10%
Employee Expense	20-22%
**This includes benefits, taxes, etc.	
Owner Doctor Salary	13%
Advertising/Marketing	3-8%
Rent	4-5%
Equipment	2-3%
Chiro Supplies	3%
Office Supplies	2-3%
Professional Fees	2-3%
**Accountant, Legal, Etc	
Misc Fees	15-20%
**Includes Utilities, bank fees, etc.	

Other important numbers to calculate:

1. How much does it cost you to get a new patients?
2. What is your ROI on your marketing efforts?

**What Are The Next Steps For Your Practice?**

1. How can you use the information that you have learned to create financial change in your practice? List 3 areas:

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2. What quarterly or annual objectives will you have for 2013? List 5 Specific Quarterly and Annual Objectives:

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