

Integra Practice Management Series

[Checklist for Starting Your Practice](#) [Checklist for Developing Your Practice](#)

Checklist for Starting Your Practice

Note: This checklist assumes the doctor is starting a new practice from scratch. Some doctors will choose alternative ways to practice such as joining an existing clinic. In this case many items may be ignored.

15 months to opening

- Set personal goals for your working career
- Think, dream and plan
Take a little time to step back from your day-to-day life and think about what you like and where you would like to go. What is your passion? What makes you happy? What type of patients would you like to work with?
- What are your attitudes toward money?
You may be facing a large amount of debt that will have to be repaid. Is this incompatible with your dreams or can they be combined? How much do you spend? How much do you need?
- Look at all aspects of your life
What percentage of your time and mental energy will you spend on yourself, your career, your friends, your family, your social life, your spiritual life and your partner?
- Think about what makes a good doctor
There are many things that make up a good doctor. First-rate medical knowledge and skills are important but are actually only a small part of a broader mix of necessary skills, including communication, marketing, finance, time management and strategic thinking.
- Think about what makes a good business person
In addition to the above, a good business person shows attention to detail, is highly motivated, confident, focussed, and ethical. There will also be times of hardship, when you will feel like giving up. This is where your solid goals and proactive attitude will get you through.
- Do a personal SWOT analysis
Make a list of your personal strengths, weaknesses, opportunities and threats.
 - *Strengths - Things you are good at and that you enjoy, for example, speaking in public.*
 - *Weaknesses – Things that you are not good at or try to avoid, for example, cleaning up or keeping track of expenses.*
 - *Opportunities – Your previous job experiences or people you know, for example a job at a golf club might provide you with an excellent list of future contacts.*
 - *Threats – Things that might impede your plans, such as large debts or an ailing relative.*
- Set your goals
Now is the time to actually write out some of your goals. Be positive and use the present tense. Start with simple goals. “Develop a successful practice serving the needs of elderly patients.”
- Use the SMART method
Now refine your goals using the SMART plan.
 - *Specific - Your goal should have sufficient detail. Don't plan on seeing “more” patients. Plan on seeing 20 patients per week after the first six months of operation.*

- *Measurable – Goals should be measurable. “I will make one public speech every month.”*
- *Action oriented – Goals should be about change. “The practice will have a new website designed and up by the end of next month.”*
- *Realistic – Goals should be doable or you will end up frustrated and the goal will become a distraction.*
- *Time-sensitive – Write goals in the present tense and make sure there is a timeline attached. Revise goals as necessary.*

...but also expect chaos!
Stuff happens. Your partner gets transferred to a foreign country. There is a fire in your building. Examine how well you can roll with the inevitable chaos of life, and can you rebound and even turn the chaos into a positive experience? “Perhaps I can set up a new practice in the foreign country or now we can build a bigger clinic.”

Determine your patient focus and conditions (This may change depending on your location)
This will depend on your location and personal interests. If you are in a small town, it may be difficult to focus on any special interests. If you are in city with many NDs and a large population, you may want to distinguish yourself by marketing to a specific niche. Think long and hard about this decision as this may shape your entire career. Create marketing materials that are in line with your area of special interest and seek additional resources to develop your expertise in this area. Ideally, if there are organizations or groups you could contact to develop a relationship or schedule a speaking arrangement, do so.

More on patient focus

Patient focus
What type of patient do you feel you would like to focus on?

- 30%
Your chosen focus will probably will probably end up being only 30% of your patients, but it still provides a focus for you and your clinic.
- Pediatrics?
Do you like kids? Are you willing to work outside of “normal practice” hours? Is your clinic “kid friendly” –lots of toys, bright colours, etc. If it is too “kid” oriented, will this turn off other patients. Does your location match this focus?
- Aging baby boomers?
A huge market! A large demographic of aging “boomers” are increasingly interested in their health.
- Business persons?
A convenient location is important here. Fast, professional service and an emphasis on comprehensive health assessment is key.
- Geriatric patients?
Again, a huge market. Can you combine your practice with other services such as meal delivery, visits, and home care?

Decide on type of practice -alone/with partner(s)/with chiro/with MD
This is another important decision. On your own, you are the boss, and you get to keep all the rewards. But, you also shoulder all the cost and responsibility, and as they say, “it can be lonely at the top.” You also lose any chance to “leverage” your time by having others share the considerable overhead (fixed cost) of running a practice. Partners allow you to refer patients, and cover each other for holidays. But partnerships can be difficult too unless the responsibilities are clearly spelled out in an agreement. Another solution is to go into a cost-sharing arrangement with your fellow practitioners.

Decide location – what province or state
Location, location, location. This could be the most important choice you make when opening a clinic. Federal and provincial government websites have excellent information on the demographics of where populations are growing. Consider the patient potential when looking at locations.

- Refine location – what part of city or rural location
Consider your market and your competition. Do you want to open across the street from a medical clinic? Look at psychographics – most patients are women in the middle/upper middle income bracket. Do they reside near your clinic? Conversely, is there a lack of doctors in the area? This will be a benefit to your practice.
- Start recording all business-related expenses and save receipts
This should really begin at the beginning of first year of naturopathic college, with your textbook and medical equipment receipts or any physical items that you can transfer to your practice later (you will need to factor in depreciation). More importantly, save all business-related expenses within the first calendar year of starting your business. Keep anything that you consider an expense to help you earn money. Don't discriminate; let your accountant do that for you later.
- Begin to develop a business plan including financing needs
- Start early
Thinking early about your business plan will help to focus your thoughts about the type of practice you intend to embark on. For example, you may come out of college with too much debt to even consider borrowing more to outfit a new practice. In this case working for an established clinic might end up being your only option, and reduce your own stress over the first few years.
- Use the Internet
*There are many great sites with free materials to help you develop a business plan. Two excellent resources are:
The Interactive Business Planner at <http://www.canadabusiness.ca/ibp/en>
The Business Development Bank website at http://www.bdc.ca/en/business_tools/business_plan/*

At this stage start with a rough plan, but it will guide you when you visit other practices and ask for information. You will probably need help with the financial projections, but don't worry too much at this stage. Just get started with five or six sections in a binder that you can add to as you go along.
- Meet with potential financing sources
- Again, start early
It's a sad fact of life that no one will just give you money ...except maybe your mom or dad! And that might just be a good place to start. Many a potential entrepreneur has relied on "family financing" only to have their plans sadly derailed at the last minute when the promised cheque was not forthcoming!
- What's in it for me?
This is the first question you will get, although in most cases it will not be put so bluntly. Every lender wants to know whether they will get their money back, and what interest they will earn on their money while it is outstanding.
- Put yourself in their shoes
Every lender has a horror story of a borrower who looked so nice, and honest, and hard working, and had such a great business plan ...and then it all went bad and they moved to Mexico, without paying them back.
- Be realistic
Everyone wants to open the best looking clinic, but you'll probably scare off your lenders if your plans are too ambitious.
- Keep it simple
How much do you need to borrow? How much interest will you pay, and when will you pay the money back? Does the business plan make sense?

- Share the risk
Are you putting up all your own money first? Will you give additional security such as a lien on your car or a second mortgage on your house? While no lender wants to go through the hassle of collecting on this type of security, it shows your commitment.
- Make it as easy as possible for the lender
Draw up the legal documentations. Give them post-dated cheques.
- Establish trust
If you say you are going to phone back this afternoon, do it. Show that “your word is your bond.”
- Communicate
Talk about your problems, fears, uncertainties. If you can’t make a payment, phone before the cheque bounces. And come up with a plan to make good on the money as soon as possible.

10 months to opening

- Decide on a name
 - Take your time
Choosing a name for your practice is a very important first step and lays the foundation for how your public will view your business in the future.
 - Don't involve all your friends and relatives
It might seem like fun to get everyone involved, but you can only pick one name and the rest will be disappointed. You don't want a name chosen by “consensus” either –it will probably end up being too plain. You and a couple of your right-brained friends might be a better combination.
 - The name should be easy to remember and spell
For example drawing on our guiding principals you might decide on Vis Medicatrix Clinic, but would anyone be able to spell or pronounce it? Keep it simple.
 - Using your own name
Dr Penny – The Natural GP has a nice ring, but The Wilde Clinic (my name) probably doesn't have the image you want! Will this limit you if you decide to bring in other partners later.
 - Use the web
There are a number of sites with tips on choosing a name.
<http://www.naming.net/naming-questions.html#1>
10 questions to ask when naming a business.
<http://www.canadabusiness.ca/>
This Canadian Government site has a wealth of information on starting a business and then links to all provinces cover provincial regulations. Going to “Ont.” will get you to The Canadian-Ontario Business Service Centre which has lots to tips on choosing a name and then sites to search if the name is already being used and details on how to register your name.
<http://www.naming.net/>
Allows you to enter a word and it will come up with combinations of the word. There is even a rhyming option!
 - Be careful mixing two words
This seems quite popular now, witness names like Securicorp and QualiServe. There is nothing wrong with either word, it's just that the combination sounds forced.
 - Avoid boring
International Business Machines, General Motors, and Minnesota Mining and Manufacturing ...Ho hum. But we all remember Yahoo!
 - Avoid misspelled or invented names
Kind Klinik may sound cute but will be hard to look up on the internet. You know the name Kodak but only because of their massive advertising budget!

- Overused names
Wellness, nature, natural –all overused.
- Do a rough search using Google
This will be depressing, because probably any name you can think up has been used somewhere. If it is used outside Canada and the US it may not be a big issue.
- Do a search in your province/state
*Now you'll have to start paying. If the proprietor chooses to carry on a business under a name other than their own, they must register with the Ministry of Government Services (MGS) under the Business Names Act (if a sole proprietor establishes a business in his/her own name, without adding any other words, it is not necessary to register the business). Business name registration is valid for five years at which time a renewal is required. The registration of the business name does not in itself ensure the exclusive use of that name in Ontario for the individual registering it. MGCS has no obligation to avoid name duplication or to advise anyone registering a name that it has been previously registered.
To avoid duplication you may wish to check the Newly Upgraded Automated Name Search (NUANS) report. This is a computer report consisting of corporate names, business names and trademarks that have already been registered and are similar to the proposed corporate name. The NUANS can be conducted by a searcher of record or by [Cyberbahn Inc.](#), [Dye & Durham, A Division of The Cartwright Group Ltd](#) and [ONCorp Direct Inc.](#), the latter three are all Service Providers, under contract with MGCS. Please contact the provider of your choice for information on the fees for a NUANS. A NUANS is not required if incorporating a numbered company*
- Develop a design for your card/website/signage
Image IS everything. Consider hiring a graphic designer to create an image for your clinic. Make sure all the elements of your design are consistent.
- Purchase a domain name
Visit www.domaindirect.com. You can search for a domain name consistent with your image. The average cost is about \$200/year. This comes with email and other tools to allow patients to stay in touch with you. Dot.com and Dot.ca are still the best domains to own. Purchase both domains to insure others cannot use your name for other purposes.
- Arrange for web hosting
www.domaindirect.com provides the web hosting and tools for designing, uploading and maintaining websites. This company is well known and respected.
- Develop a rough partnership agreement if applicable
It is so important to get potential areas of disagreement out in the open before you start. This is one area where a lawyer must be involved. And one further warning, just because a clause is in the partnership agreement, that does not provide a guarantee that it can be enforced.

Five months to opening

- Complete business plan
*There are many resources for writing a good business plan. Business plans are not just a tool used to secure financing. They are a tool used to document the future goals and objectives of your business and how you will get there. After you have spent so much time and energy writing your plan, don't just put it on a shelf, refer to it and compare your actuals with your projections.
See these websites for guidance on how to write a business plan and for business plan templates for step by step guidelines on how to write your plan.
If you are a woman entrepreneur, there are many organizations that are there to support you. Do a Google search for such organizations in your area.*

<http://www.rbcroyalbank.com/RBC:SF@n4Y71JsUAULCyhCg/sme/create-plan.html>
http://www.canadabusiness.ca/servlet/Contentserver?cid=1081945275379&pagename=CBSC_ON%2Fdisplay&lang-en&c=GuideFactSheet
<http://www.entrepreneurship.com/tools/pdf/businessPlanWorkbook.pdf>

And many more! Do your own Google search, and you may even find a template more specific to your particular type of practice.

- Register your business with provincial/state
You will need to register your business with the Canada Revenue Agency. As a naturopathic doctor, you will register your business as a sole proprietorship.
To register your business with the Canada Revenue Agency, go to:
<http://www.cra-arc.gc.ca/tax/business/topics/bn/menu-e.html>
You can do this online and it is free. This website will provide you with the information that you will need to register your business. If you are opening your own clinic, you may decide to incorporate the clinic or register the clinic name separately. This may be done as a sole proprietorship or as a partnership.
- Apply for a GST #
You will need a goods and services (GST) # in order to bill for GST. You are not required to bill for GST until you are making \$30,000 in your business. In order to maintain consistency, you may want to register before you make this amount of money, so that you do not suddenly start charging GST. See the CRA website at the link below for directions on how to register for a GST number. It can be done quickly and easily online, and it's free.
<http://www.cra-arc.gc.ca/tax/business/topics/gst/menu-e.html>
- Set up an account with Canada Revenue Agency/IRS for withholding tax if you have employees
As a Canadian employer, trustee, or payer, you are responsible for deducting Canada Pension Plan (CPP) contributions, employment insurance (EI) premiums and income tax from remuneration or other types of income you pay, remitting them to the CRA and reporting them on the applicable slips. You should refer to the Employers' Guide - Payroll Deductions and Remittances available at:
<http://www.cra-arc.gc.ca/E/pub/tg/t4001/t4001-e.html>
Your bookkeeper should also be able to handle this for you.
- Set up account with province/state for sales tax
For Ontario residents you can refer to this site.
<http://www.rev.gov.on.ca/english/guides/rst/901.html>
Your services are not subject to RST (retail sales tax) in Ontario, but any supplements you sell are. Also, if you purchase an existing business you are subject to RST on the value you paid for all tangible assets such as examination tables and computers. The value of the business "goodwill" that you purchase is not subject to RST.
- Interview banks
Remember, you are the customer and choose the bank that can give you the best service at the best price.
- Open a business bank account
You will need your business registration papers for this step.
- Obtain police check
A police clearance letter is required for your registration with the Board of Directors Drugless Therapy – Naturopathy (BDDT-N) (and potentially for other regulating bodies across Canada). The procedure for this will differ depending on where you live. The procedure and length of time necessary to obtain this will also vary depending on where you live. Check with your local police for the procedure. If you are obtaining a police check through the City of Toronto, visit <http://www.torontopolice.on.ca/recordsmanagement/clearance.php> for the cost and the type of

documentation you will require. You may want to do this while studying for NPLEX as the procedure can take several weeks in some areas.

- Malpractice insurance
You can obtain this one of a few ways. Through the CAND and Partners Indemnity, this option has been around the longest. It is also available through the OAND if you will be practicing in Ontario, with a private company that supplies insurance to NDs. The cost is about \$550 / year but it may be more depending on the type of coverage you have.
http://www.oand.org/files/ND_Protect/ND_Protect_Program_Brochure.pdf
<http://www.cand.ca/index.php?id=200&L=0>
- Join provincial/state association
OAND (Ontario Association of Naturopathic Doctors)
<http://www.oand.org>
- Join federal association
 - Canada – CAND (The Canadian Association of Naturopathic Doctors)
 - <http://www.cand.ca>
 - USA – AANP (American Association of Naturopathic Physicians)
 - <http://www.naturopathic.org>
- Personal health insurance
What would happen to your practice if you were hospitalized for some reason? Check with your insurance broker about disability insurance and read and understand the policy exclusions carefully.
- Interview and hire a lawyer
Again, you are the customer. Look for someone who takes an interest and is willing to work with you.
- Lawyer reviews financing terms
- Lawyer reviews partnership agreement
- Search for and negotiate suitable location
Based on your demographic and psychographic research find a location(s) that matches your research and meet with property managers to determine if the location meets your clinic needs and budget
- Check with your city for zoning requirements
Make sure your location is zoned for a medical practice. This is particularly important if you intend to operate from your home. You will probably also be subject to local business taxes.
- Contractor for leasehold improvements
Ask around and try to meet with previous customers.
- Design and arrange interior signage
As mentioned, ensure you work with a professional to design your signs and your interior. Investment in design for your clinic will ensure staff and clients have a positive experience.
- Lawyer reviews lease
- Utilities installed - heat, electricity
You may be required to come up with a deposit as a business customer.
- Advertise for office receptionist

- Obtain a phone number from phone company
Try to keep your own number even if you are working in an established clinic. Most phones can be set to forward the call.
- Design and print cards
Your business card is your introduction. The “look” of your card, including the stock you use adds to your image. Consider printing on both sides of your card. You can list your service on the back of the card.
- Hand out cards to everyone you meet
Every person you meet is a potential client. Don't be afraid to always provide a business card to everyone you meet.
- Design and print advertising brochure
As with signage, website and business cards the first impression potential patients get is from your brochure. Work with a designer to create a brochure that reflects your practice. A picture is worth a 1000 words. Print on good stock and consider a mail drop in your area.
- Design and arrange website
Finalize the above-mentioned direction on your website. Make sure to test your website. Have friends test it and give you an honest opinion.
- Order computer/printer
- Purchase a bookkeeping system or
- Interview and hire a bookkeeper
 - So called “One Write” systems are good:
 - <http://www.one-write.com/>
 - ...although hiring a bookkeeper is probably best when starting out. Ledgers is one service that specializes in bookkeeping for naturopathic doctors, but there are many others providing small business services.
 - <http://www.ledgers.com/>
 - Expect to pay between \$100 and 300/month.
- Arrange renovations
- Order office furniture
- Record personal items transferred to business
The tax laws basically say that “any reasonable expense incurred to earn income” can be deducted for tax purposes. Keep track of your expenditures, and save your receipts.
- Obtain virtual phone
- Design and print Patient Intake Forms
Use resources that are already available to you before reinventing the wheel. Many NDs have their patient intake forms on their website to be downloaded. Check around for features and questions that will be useful to your particular type of practice. This form is dynamic and ever changing. Make modifications as needed. Also remember a pediatric intake form or forms for other special populations if you intend on focusing your practice. CCNM provides alumni association members with blank patient intake form templates. Visit the alumni section at www.ccnm.edu for more information.
- Design and print invitations to opening

Make sure your invitations are consistent with all of your other marketing materials. Send invitations to everyone you know. Make sure to give extra invitations to friends and family and ask them to pass out to friends. Don't forget about email invitations and Facebook.

- Meet with 10 people/wk about your practice
You need exposure. Even though you're probably not too comfortable about this part you need to get out there! Think of any excuse. Introduce yourself in the elevator, on the ski tow!

Two months to opening

- Clinic renovations under way
Remember, changes will add to your cost. Be gentle with your contractors!
- Arrange Visa/MasterCard services
Your bank will help here.
- Meet with supplement companies
All of the supplement companies would like their products in your dispensary. Use the information provided in the grad bags to initiate contact with the companies. Ask for new grad terms for your clinic. Many companies will have special pricing for you.
- Arrange for phone installation
- Internet connection installed
Consider using the same company for your phone and internet. It will be simpler to deal with one company. Rogers and Bell both provide small-business packages. Call or check websites for offers.
- Design and arrange outside sign
Keep working with your graphic designer to insure a consistent look for your outdoor signage. Make sure you check with property manager to make sure your sign is within the city bylaws.
- Develop or obtain patient handouts
"Take away" information is great for patients. The CAND and OAND have handouts you can purchase. Consider creating your own collateral that fits with your branding. Remember, time is money, and you want to spend the most amount of time on tasks that make money (seeing patients or marketing when you are not seeing patients). Check in with friends and colleagues for forms they have already created, or get into a group and divide up a list of important forms to create and share. Don't forget to use the RSNC's charts and forms included in your alumni association membership package.
- Appointment book
There is lots of software out there for this. Patient Appointment Manager (about \$300) seems to be quite good: http://abs-usa.com/solutions/appointment_scheduling_software/pam/default.aspx
- Send out invitations to opening
And follow up with a phone call. Have some "fun" activities and demonstrations.

One month to opening

- Arrange two speaking invitations
While this can be difficult for some people, the ability to make a presentation to a service club, school, corporation or chamber of commerce can provide information about your new practice and attract new patients. Create a presentation about naturopathic medicine and your practice and practice your presentation.

- Clinic renovations
- Interview and hire a lab service provider
- Phone line installed
- Develop office procedures
- Patient tracking system
- Hire receptionist (you may want to wait until you start)
- Order initial stock of supplements
Speak to other NDs about this, and learn from others' mistakes. Most will tell you that when they started out, they sank FAR too much cash into supplements that just ended up expiring on the shelf. Others will say that they bought many supplements for conditions they thought they would be treating but now are not. If you live in the GTA you may want to consider using BMS as a resource at the beginning when volume is low. Also consider that most supplement companies have a very short turn-around time and you can always have supplements directly shipped to your patient. Ideally, you want to purchase a supplement from a company on your credit card, and sell it before you pay for it (i.e., before your credit card bill is due).
- Order office supplies/lab coats/name tags
- Distribute advertising brochures
Use direct mail and newspaper to announce your opening. People can't come and visit you if they don't know you exist. A postcard style mailer works best. Local printers can produce this inexpensively. Work with your designer to insure consistency.
- Arrange catering/refreshments for opening

One week to opening

- Try to book at least three patients
- Clean the clinic top to bottom
- Practice clinic operating systems

Opening day

- Be a great doctor

Checklist for Developing Your Practice

One month after opening

- Take a deep breath.
You have survived the first month of being in business for yourself. Your clinic probably isn't as busy as you would like but this provides you a great opportunity to do some planning, promotion and to get your systems in place.
- Plan an open house.

After your "soft opening", now is the time to plan an "Open House" where you can thank all the people who helped you get started, and also get some great PR for your clinic. Don't forget special invitations to everyone who helped, including your lawyer, the framing carpenter and the electrician. Dan and Tara have some great hints on planning and running a successful open house at:

<http://alternativehealthpractice.com/2009/07/tips-for-a-successful-open-house.html#more-435>

- If you have an employee, now is also the time to get a system set up for GST/PST and employee tax deduction remittances. Your bookkeeper should handle this but make sure you understand how these payments are made, as the penalties for late or non payment are very severe.
- This is also a good time to review your cash forecast for the last month against actual and revise if necessary your forecast for the next three – six months.

Three months after opening

- This is the "downer" time for many people in business. They have done everything right, the clinic looks great but there are still very few patients. Don't despair, it's just that you haven't acquired a critical number of patients to get that all important "word of mouth" working for you. You are going to have to advertise and market yourself. But what is the difference and where do I start? [As Laura Lake explains in About.com](#), "The best way to distinguish between advertising and marketing is to think of marketing as a pie, inside that pie you have slices of advertising, market research, media planning, public relations, product pricing, distribution, customer support, sales strategy, and community involvement. Advertising only equals one piece of the pie in the strategy."
- Eli Camp has provided some excellent pointers for a Naturopathic Practice in Tricks of the Trade: Successful Marketing Strategies for Your Clinical Practice.
- Don't forget to keep updating your website and keeping the information current
- Establish and follow a marketing schedule that will eventually become second nature to you (e.g., spring – detox newsletter; summer – weight loss support group; fall – boosting your immune system; winter – healthy holidays). Send out appropriate promotional material (mailings to current patients, e-newsletter etc...).

6 months after opening:

- Preparing and filing GST returns. Keep business related receipts and enter them into a tracking system.
- Preparing and filing income as a business
- Monitoring the turnover of the product inventory and negotiating product returns where appropriate
- Discussing referrals with patients
- Patient recall – ensuring they visit frequently enough to achieve the health improvements they are seeking
- Developing a patient newsletter (and ensuring you seek your patients' permission to send it to them). This is something that could be done in conjunction with classmates in other locations. A newsletter that briefly highlighted research findings related to naturopathic approaches on a monthly basis might be highly appreciated.
- Managing your finances - distinguishing between gross revenue and your earnings
- Develop relationships with neighbourhood health providers - dentists, pharmacists, health food stores, health clubs, etc.

- Develop systems that work within your practice and apply them (dispensary replenishment, opening and closing procedures, payment procedures)
- Create policies and procedures manual to help train future staff (create these with the "busy clinic" scenario in mind)
- Develop a "15 minute introductory consult" text to review with patients who want to come in and meet you.
Determine what you will ask the patient in this time and what you will want to tell them (i.e., the principles of NM, ask them their goals and chief complaints and address how you would work with them to achieve goals, discuss health as a fluctuating process that involves body, mind, spirit...whatever resonates with your practice style)
- Develop an initial visit sequence that motivates the patient (don't forget to establish patient goals and set realistic expectations and timeline).
Ask them how they found you (e.g., give them a one minute intro about yourself, tell them what to expect on the first visit, and in the coming weeks, set realistic expectations and timeline for work together, ask them their chief concerns, review the intake form, do vitals, give diet diary and review of systems form, book follow up for one week)
- Get together with a group of colleagues on a regular basis to discuss ideas and share strategies that work for patient recruitment/retention and to share the workload (and for moral support)
- Manage QuickBooks/excel spreadsheet on a regular basis, don't forget to track GST separately (you may want to get in touch with your accountant for a template that is appropriate)
- In the "down time", create three – four basic presentations that would appeal to local businesses and approach employee wellness coordinators of businesses in the area
- Develop a system for monitoring monthly cash flow
- Seek out mentors in the field and arrange to get together with them (bring your questions!)
- Every two – three, assess your practice through the eyes of your patients (walk through the clinic, note any areas that are not being cleaned, is other patient information out of view, is it easy to for new patients to find the suite, is the website representative of the clinic, etc...)
- Assess patient retention and determine your attrition rate (are you losing patients? if so, why?)
- Budget your "promotion time" carefully because every minute you spend not seeing patients is money lost