



Ideal Practice Checklist

Client Name:

Date:

FRONT DESK:

Excellent	Satisfactory	Unsatisfactory

- 1) Understands Natural Healthcare
- 2) Friendly
- 3) Professional demeanor
- 4) Good control of patients
- 5) Firm on appointments
- 6) Patient policies exists
- 7) Patients grooved in on patient policies
- 8) Front desk is strong on handling objections
- 9) Good at collecting money
- 10) Recall procedure in place
- 11) Effective at recalls

PATIENT FLOW:

Excellent	Satisfactory	Unsatisfactory

- 12) Minimum wait for service (less than 18 minutes)
- 13) Patients generally on time for appointments
- 14) Practice utilizes InBody (B.I.A Testing) for patient progress
- 15) Practitioner properly uses Lifestyle Educator/Assistant every shift

PATIENT RETENTION:

Excellent	Satisfactory	Unsatisfactory

- 16) Patients generally sign up/pay for extended program (6 weeks or greater)
- 17) There is an effective patient reactivation program in place
- 18) Re-exams are done according to schedule
- 19) Patients are shown positives and negatives during re-exams
- 20) Lab testing are reordered and reviewed
- 21) Care calls are done consistently by Practitioner or Health Coach

QUALITY CONTROL:

Excellent	Satisfactory	Unsatisfactory

- 22) Practitioner effective at re-exams
- 23) Testimonials solicited
- 24) Testimonials displayed and used
- 25) Weekly staff training takes place (role playing and drilling)

NEW PATIENT DIVISION:

Excellent	Satisfactory	Unsatisfactory

- 26) Practice is well known in the immediate community
- 27) Alliances are sought after and established
- 28) There is an on-going patient reactivation program
- 29) Practitioner utilizes social media for marketing
- 30) Good website-easy to navigate/ collects emails
- 31) Good social media presence

PRACTICE FINANCES:

Excellent	Satisfactory	Unsatisfactory

- 32) Practice is collecting enough money
- 33) Practice utilizes stat-tracking graph system
- 34) Staff bonus system in place
- 35) Understands ideal income formulas

EXECUTIVE:

Excellent	Satisfactory	Unsatisfactory

- 36) Staff understands and promotes clinic mission
- 37) Practitioner sets weekly targets, stats, and goals
- 38) Targets are set weekly for major products
- 39) Practitioner makes time during the week to wear CEO hat
- 40) Do you have trouble finding better staff?

GENERAL STAFF:

Excellent	Satisfactory	Unsatisfactory

- 41) Staff are in agreement with general policies and procedures
- 42) Workable bonus system is in place
- 43) Correct number of staff in place
- 44) Staff morale is high

Nutrition Department

Excellent Satisfactory Unsatisfactory

Excellent	Satisfactory	Unsatisfactory

- 45) Online sales are substantial
- 46) Adequate inventory
- 47) Products never expire
- 48) Consistent repeat orders
- 49) Auto-ship program in place
- 50) Selling nutrition product packages (12-week)
- 51) Reward program in place

General Administration

Excellent Satisfactory Unsatisfactory

Excellent	Satisfactory	Unsatisfactory

- 52) Communication center is in place and used (in-basket system)
- 53) Files are in good order
- 54) Flowchart is up-to-date, in place, and used
- 55) Computer system is functioning adequately
- 56) Staff schedule is posted and signed by all
- 57) Doc can work up case efficiently

Please Fill Out:

Name:	
Business name:	
Address:	
Phone Number:	
Email:	

Please use the space below to add any additional comments, questions or suggestions to help improve your life and practice.

"Better to be slapped with the truth, than kissed with a lie." - Russian Proverb

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