

The Roadmap to Success

*** please highlight your answers in blue, and email to drccraig@maximizedhealth.net when completed.

Growth and Development (Company Focused):

In the next 6 months, what Outcomes would I like to see our Company make measurable progress on and why? (*Outcomes, i.e. how the Company operates and the results of Company operations.*)

1) *Structure and Systems Development:* Defining/outlining key operations that lead to growth. Creating process maps that highlight strategic components required for predictable outcomes.

2) *Automation and Consistency:* Train team to consistently manage tasks via dashboards, scoreboards, and task lists. To be done to ensure that details are effectively managed, thus allowing for creative flow in the gaps.

3) *Referral Marketing:* To improve that landscape of new business flow towards the ideal client and Dream 100 position.

4) *Raving Fan Culture:* To develop a highly educated, engaged and committed client base that helps build the practice with us via “tribe mentality” and strategic referral based marketing programs.

5) *KPI Stats Tracking and Reporting:* Help key players keep a closer eye on the score, knowing what levers to pull and when to actively produce the outcome we strive for.

What Outcomes would we like to see other Company members make progress on and why?

Details and KPI Awareness: We can improve dramatically in this area - and, success will follow!

Use Tools and Systems: Effectively using the right tool, the right way, will produce the right outcome.

Urgency: Increase pace, focus and intensity. (DISC assessment)

Personal Development: Focus on physical/mental fitness and development. Consistent focus here creates a sharper more effective tool. Lead by example. CANI.

Innovation and Strategic Contribution: Suggestions for improvements at any/all levels that directly impact and improve key outcomes, i.e. support and growth.

How can we help those members better achieve these Outcomes?

Company Culture: create a culture whereby this is not only encouraged, but rewarded.

Open Door Policy: It's always okay to email suggestions, ask for assistance, etc.

Tools and Resources: create tools that efficiently manage the details, thus reducing stress and increasing performance.

DISC and Personality Awareness: Understanding how each person prefers to function. Help them create a DISC-driven system of being ultra-productive, and yet, enjoying the process.

What is the one thing, that if we had it accomplished today, would make the biggest difference in closing the gap between where we are now and where we want to be at the end of the year?

Bulletproof Systems for Managing KPI's: signups, startups, clinical outcomes, patient education, tribe mentality development, resigns, referrals.

Daily Strategic Engagement: We have to execute tactically everyday, but if we ALL added a little strategy on a daily basis - we would all be more productive and grow faster.

If the only hurdle between where the Company is now and where we would like to be is the support of others:

- **Whose support do we need?** Everyone
- **What specific support is needed?**

Doctors:

- 1) Client engagement and development (resign/referrals)
- 2) Dream 100 program engagement with PhD mentality
- 3) KPI tracking (knowing/improving the score)
- 4) Internal marketing
- 5) Strategy and innovation

Tom:

- 1) Strategic task management
- 2) Strategic management/development of teammates
- 3) Innovation
- 4) Delegation

- Casey:
- 1) Strategic task management
 - 2) Strategic management/development of teammates
 - 3) Innovation (care plan manager initiative & the perfect startup)
 - 4) Delegation (engage in higher level tasks)
 - 5) Optimize scheduling on all fronts
- April:
- 1) Optimize massage department (reduce glitches)
 - 2) Rework Infusionsoft campaigns for chiropractic (all levels)
 - 3) Initiate internal marketing outline for massage and BAX
- Myself:
- 1) Develop schedule for assessing KPI frequently (finger on pulse)
 - 2) Monthly staff development meetings
 - 3) Monthly doctors meetings
 - 4) Stay focused on Dream 100 campaign development
 - 5) Compartmentalize in office hours

Growth and Development (Personal Position/Role Focused):

In the next 6 months, what Advancements would I like to make measurable progress on and why? (*i.e. how I could better operate in my current Role and what results that would offer.*)

Develop strict, automated, iron clad schedule for:

- 1) Assessing all KPI indicators
- 2) Monthly staff and doctors meetings (develop/support team)

Compartmentalize in office hours

What is the one thing, that if I had it accomplished today, would make the biggest difference in closing the gap between where my Position/Role is now and where I want it to be at the end of the year?

A strategic plan for managing and supporting the Team.

- 1) Systems Development: All players now what to focus on, when. All players know the score of their own performance, and its effect on the Company objective.
- 2) Monitoring and Training: A system that offers frequent analysis, and immediate intervention as needed.

If the only hurdle between where my Position/Role is now and where I would like to be is the support of others:

- Whose support do I need?

Doctors & Team: Create an up-time environment that allows me to spend more time assessing, managing, training, strategizing, etc.

Business Coach: Interview and hire

- What specific support is needed?

Protect The Quarterback Mentality: Encourage me to stick to my position, avoid being taken down or distracted, and call the right plays in a timely manner.

Company Organization:

What specific changes in Company organization need to take place in order for the Company to progress as I hope it to?

Clearly define who is responsible for key components of the Process Maps, specifically the resign phase (we need improvement here).

Tom must delegate and find more time to engage as Care Plan Coordinator and PI Marketing Coordinator.

Doctors must continue to improve role as leaders and trusted advisors, as well as take over internal marketing (improve signup, resign, and referrals).

Casey must delegate and find more time to engage as Care Plan Coordinator

How can I play a role in making these changes?

Delegate. Empower. Assist as needed.

Observe. Measure, Reward and Intervene as needed.

Task Organization and Time Management:

What challenges regarding organization and task management am I currently facing?

I need an organized, automated schedule for managing, assessing, and supporting/developing team.

I need a written 5-year plan with vision, goals, and a measuring stick.

What specific changes can I make to improve my level of organization and task management?

Develop automated managing calendar: goals, meetings, metrics reporting

Task Management Style:

What changes have I made in my task management style within the last 6 months?

Written some process maps. Bringing back dashboards. Adding scoreboards. NOT ENOUGH THOUGH.

What challenges regarding effective task management am I currently facing?

Missing long term element.

Missing automation and consistency.

What changes will I make in my task management style in the next 6 months?

Clearer definition. More detail. Consistency. AUTOMATION.

Company Goals and Vision:

What goals for our Company would I like to see in the next period and/or the remainder of the year?

Hit the 300+/week mark with ease and consistency.

Create a company culture where everyone:

- 1) Clearly knows their role
- 2) Is constantly learning and growing
- 3) Is fulfilled by what they contribute

Operate at a higher level more consistently with minimal stress and confusion by defining, automating and regulating

Pay our key players more \$\$.

Plan for second office.

What are the steps our Company needs to take to achieve these goals?

Commit to quickly creating and adhering to what is written on these papers.

Hold each other accountable.

Operate with urgency and intensity - while having fun doing it!

What would be an outrageous, yet feasible goal our Company could accomplish this year given the correct resources were at our disposal?

Hit 325/week average.

Dramatically increase our signup and resign numbers.

Successful execution of our Dream 100 initiative.

Automate our patient education department and FU process.

Start the process for opening the second office in 2017.

What resources do we need?

Clear goals. Consistent effort. Measurement and timely adjustments. URGENCY.

TEAM EFFORT!

How can we obtain and leverage these resources?

I will mastermind the bulk of the strategic overhaul and task delegation. But, I really could use help and suggestions... not to mention loyal commitment to goals and processes on a daily basis.

Personal Goals:

What personal goals do I have that hinge on Company growth and success? (i.e. time, travel, family, money, career, etc.)

Help key players in our Company grow and develop personally AND financially.

Create opportunity to help chiropractors partner with Maximized Health in satellite offices.

Contribute to the chiropractic profession via speaking and online programs.