

Practice Efficiency Score Card

Put a ✓ next to each box that you have a solid system for.

Before visit 1

- Scheduling with you is easy
- Paying for their visit is intuitive
- They can easily message you with questions
- They know where to go and how to get there
- They know what to expect when they get there
- They know what you look like and who to look
- They know what to wear
- They know what to bring
- They know how long/how much
- They have an understanding of what you do

At visit 1

- Payment is always received and is easy to collect
- You run on time
- Your clients get receipts easily
- Your clients know what you are going to be doing
- Your office space is well-prepared for your clients
- You are well-stocked with drinks and snacks to offer
- You are prepared with up-sells and additional offerings
- Clients are comfortable if they need to wait
- Clients understand the next steps, care plan goals
- There is clarity around expectations/office policies

Once a client

- They commit to consistency of care
- They understand what you do
- They know how to refer to you
- They know when their current plan ends
- They can easily reschedule if needed (on their own)
- They know what to expect with your care
- They understand your payment system
- They can pay you without your involvement
- They understand and respect the policies of office
- You have personal boundaries with them in-check

Your time/energy

- You are in \$ fair exchange
- You are in time fair exchange
- You get home when you say you will
- You get to the office when you say you will
- You work the amount of hours you say you will
- You have clear communication with team
- You have clear communication with clients
- You pay yourself well
- You feel prepared for your work-days
- You leave work at work

Your office systems

- Your phone messages get handled
- People know when and how to reach you
- You have community partnerships you can count on
- Your bills are paid
- Your notes are done on the day you see your clients
- Your filing system is on-point
- You have a solid practice SOP (office policy guide)
- You are proud of the condition of INSIDE the drawers in your office
- Your office is clean, tidy, and well-organized
- If you have a team, they get the culture in your office and support it

SCORE

Count the total number of ✓'s.
Give yourself a practice efficiency score. Each ✓ = 2 points.

Less than 60 ➡ you need some help
60-80 ➡ you could use some support
80+ ➡ you are crushing it