Planning to Thrive

A quick guide to putting your practice into action
Planning Guide

Key Areas to Focus On:

- Business Mission, Vision, Purpose and Values
- SWOT and PESTEL Analysis
- Defining Key Business Result Areas
- Creating Measurable Outcomes
- Setting Goals to achieve Outcomes
- Monitoring Progress
- Celebrating Successes
Mission, Vision, Purpose & Values

- Mission – Why do you exist?
  - E.g. Quality Chiropractic Care
- Vision – What are you aiming for?
  - E.g. Empowered people living healthy lives
- Purpose – For what personal fulfillment and greater good
  - E.g. A spinal healthy society
- Values – What guides your actions?
  - E.g. Confidentiality ~ Compassion ~ Learning ~ Innovation ~ Teamwork
SWOT Analysis

- **Strengths**
  - Communication ~ Knowledge ~ Creativity ~ Relationships

- **Weaknesses**
  - New Business Owner ~ No plan ~ Financial Resources

- **Opportunities**
  - Promotion ~ Marketing ~ Innovative Approaches ~ Cost Savings

- **Threats**
  - COVID-19 ~ Competition ~ Other health services
PESTEL Analysis

- **Political**
  - Health Care investment by current political party

- **Economic**
  - Looming recession following COVID epidemic

- **Sociological**
  - Health Benefit funding for Chiropractic Care

- **Technological**
  - Patient access to online care ~ online appointment calendar

- **Environmental**
  - Physical/mental stress caused by environmental factors

- **Legal**
  - Accident claims that include Chiropractic Care
Define Key Business Result Areas

- Client/Patient Care and Services
- Revenue/Sales
- Operations
- Financial
- Marketing & Promotion
- Information Technology
- Human Resources
Define Measurable Outcomes

- Client/Patient Care and Services
  - 300 new online patients
  - 85% repeat clients
- Revenue/Sales
  - $15,000 in online revenue
  - $50/visit - Health Benefit providers pay for online consultations
- Operations
  - 75% of client contact is by video conference
  - 25% of client contact is by phone
Define Measurable Outcomes

- Marketing & Promotion
  - E-newsletter out to 75% of patients
  - Free weekly Chiropractic Care session with membership incentive
- Financial
  - Budget is established for fiscal year 2020/2021
- IT
  - Online service delivery platform is up and running
- Human Resources
  - Staff feel connected, cared for and hopeful
Set Goals to Achieve Outcomes

- **Client/Patient Care and Services**
  - 300 new online patients
    - Update client contact to include email by April 10
    - Host first online session on May 5
  - 85% repeat clients
    - Webmaster to set up tracking of online participation/hits by May 5
    - Track attendance and measure results weekly
Set Goals to Achieve Outcomes

- Revenue/Sales
  - $15,000 in online revenue
    - Set goal and client enrolment targets by April 10
    - Membership drive April 15 – May 15
  - $50/visit - Health Benefit providers pay for online consultations
    - Advocate to bill per phone/on-line visit – Write letter today
Set Goals to Achieve Outcomes

- Operations
  - 75% of client contact is by video conference
    - Set up video conference schedule by April 15
    - Client invite sent out 1 week prior to conference schedule
  - 25% of client contact is by phone
    - Identify client list for phone contact by April 15
    - Set up protocol for phone consultation by April 20
Set Goals to Achieve Outcomes

- Marketing & Promotion
  - E-newsletter out to 75% of patients
    - Purchase e-newsletter software by April 10
    - Engage staff in creating content – Online meeting April 11
    - First newsletter launched April 20
  - Free weekly Chiropractic Care session with membership incentive
    - Engage staff in designing sessions – Online meeting April 11
    - 3 sessions designed by April 20
    - 100 new paid memberships by end of 3rd session
Set Goals to Achieve Outcomes

- **Finance**
  - Budget set for 2020/2021
    - Engage bookkeeper in establishing budget framework by May 1
    - Source out Government Funding during COVID and apply for grants

- **Human Resources**
  - Staff feel connected, cared for and hopeful
    - Weekly touch points with staff
    - Personal call to see how team is doing by April 8
    - Engage team in creating innovative ideas for online business
If you are planning and in action you are *thriving*!

Thank you for joining us!!