



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
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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
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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
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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

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If you are planning and in
action you are *thriving!*

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Thank you for joining us!!