

## Creating a Plan for a Winning Day

Lisa Bilodeau, CA

In Dr. Mark King's article, "The System Is the Solution," published in the Nov. 8, 2006 issue of this publication, he referenced Michael Gerber and his book *The E-Myth*. I have listened to Mr. Gerber's tapes and agree that the most successful businesses have systems which, when used, create their success. He gives examples of how McDonald's and five-star hotels use these systems to create the results they desire.

I named my company "Chiropractic Success Systems" because I believe systems are one of the keys to success. Therefore, I teach many different systems to chiropractors and chiropractic assistants. Over the course of this year, I will present you with systems that will allow your office to be as good as it possibly can.

In this article, we will look at opening and closing checklists that help ensure your plan for the day goes smoothly. Let's review some of the items on the checklist and why they are important.

### The Morning Shift

- Straighten up the reception area. Because this is one of the first impressions the patients have of your office, take the time to be sure your magazines are health-related (remove drug ads before placing in the reception area) and are not tattered, torn or outdated. All plants should be healthy and clean (regular dusting is a must), and the carpet should be clean, without dirt or spots. If you have a children's corner, be sure it's tidy as well.
- Check that the adjustment rooms are clean, all supplies are available (e.g. head-rest paper, Kleenex, pens, etc.) and all wastepaper baskets are empty.
- Check the restrooms and be sure they are clean and all supplies are available.
- Check the answering machine or voice mail for messages, place messages in their proper place and return calls as soon as possible.
- Check to make sure all therapy equipment is in working order and ready for patients.
- Place a copy of the schedule on the doctor's desk along with "first adjustment" call slips.
- Turn on equipment that will be used that day, such as the X-ray processor, computers and copiers. Place the computer back-up in a fireproof safe and install the backup for that day in the computer.
- Double-check to make sure all treatment cards are pulled and in the order patients will be seen. Nothing wreaks more havoc than when the patient arrives and the front-desk CA can't find the patient's treatment card. These should also be date stamped. If the patient is a "no show" or cancels, document it on the card before filing it.
- Follow up on all missed appointments.
- File all patient records from the shift.

After the morning shift is over, the front-desk CA for that shift should be sure all patients seen that morning were entered in the computer. The CA should run a day sheet and double-check that all charges, payments and adjustments have been posted correctly. It's much easier to catch an error at this time, when it's fresh in their minds; and if there is an afternoon CA, they will not end up dealing with an error that was not on their shift.

## The Afternoon Shift

- Double-check that all travel cards are in order and ready to go for the shift.
- Update the doctor's copy of the schedule.
- Process all mail.
- Call and confirm all new patients and massage patients scheduled for the next day.
- Enter all charges, payments and adjustments for the shift and print the day sheet. Be sure the morning and afternoon charges, payments and adjustments match the day sheet.
- Prepare the deposit slip, which must equal the deposit.
- Give the doctor a copy of the day sheet and the deposit.
- Give the doctor a copy of the completed opening and closing checklist.

Admittedly, this is a small portion of the daily duties required to keep the office running efficiently. One word of caution: Do not initial a task as complete until you have completed it. There always will be distractions that take us away from a task. If you initial it prior to completion, you will think it's done when it's not, and that might cause problems. If you would like a more detailed checklist, please send me an e-mail at [lisa\\_bilodeau@hotmail.com](mailto:lisa_bilodeau@hotmail.com) with "Open/Close" in the subject box.

I can't stress the importance of having this list and making sure it's completed every day. Even if you are the person who does it all, use this list every day. One of my clients likened it to the checklists used by airlines pilots. Before a plane ever leaves the gate, the pilots are required to go through a very detailed list. You would not want them to do anything less to ensure you get to your destination.

I also have seen chiropractors actually fire team members because they did not do what was expected of them. Checklists are a type of job description and can prevent misunderstandings. They also should be reviewed and revised periodically. Even if you are the only one in the office, it's important that you have a plan for the day.

Using checklist systems will allow you to stay on purpose by freeing you from unnecessary distractions. This will allow you to give your patients the "wow" experience you want them to have, and will keep them coming back and telling others about how organized and caring you are.

JANUARY 2007