

Unstoppable.

Reach Your Practice Goals.

Emily Floyd, MBA

Managing Director, Altus Pediatric Billing

Why We Are Here

This is for everyone who has set a SMART goal and didn't meet it.



Today's Objectives

1. Learn how to define a SMARTT goal.
2. Create a plan for your whole team.
3. Apply framework to your practice.

Our Framework

1. Define your goal.
2. Make it SMARTT.
3. Form a plan.
4. Talk about it.
5. Redirect, if needed.
6. Celebrate.

1. Define Your Goal

Dream big - what would change your life?

Let your pain points guide you.

Don't censor yourself.

Break it down into smaller steps.

Keep your notes.

Example

I want to add another provider so I can start to take Thursdays off in the future.

2. Make it SMARTT

Specific

Measurable

Attainable

Relevant

Time-Bound

Talked About

SMARTT Goals

Break down that big goal into steps.

Define goals for those steps.

Need to be able to answer if you met it or not.

Think through all possible limitations.

Example

Increase average weekly patient count from
350 to 400 by November 1.

3. Form a Plan

HOW you will reach your goal.

ID what needs to be accomplished.

Brainstorm how to accomplish those things.

Assign “owners” that align team to the goal.

Example

1. Reduce No-show rate from x to y by:
 - Calling patients who don't confirm (FD)
 - Sending letters to repeat offenders (OM)

Example (cont'd)

2. Reduce Urgent Care visits from x to y by:
 - Following up with patients next day to check in and learn why urgent care (Nurse)
 - Educational campaign about same-day visits (Providers)

Example (cont'd)

Increase new MD's daily visit average from x to y by:

- Newborn campaign - 1 visit with MD (Prov)
- Adding a website feature on MD (OM)
- Front Desk offer MD slot first (FD)

4. Talk About It

Not just set and forget.

Unleashing power of entire staff.

Promotes purpose, pride, camaraderie,
success.

2 tools: 5 minute meeting and a dashboard.

Tool 1: Meeting Agenda

Repeat Practice Goals

Report Progress

1 Person Gives an Update on Their Tactic

Example

Monday 8:15 am - 8:20 am

OM reads goal - Increase average weekly patient count from 350 to 400 by 11/1.

OM: Last week we were up to 372 from 365 previous week. New average is 364. Joan from nursing is going to give us an update on reducing UC visits.

Example (cont'd)

Joan: Last week we made 32 calls to patients who were seen in the urgent care. We learned many of them called us and couldn't get in because their preferred provider wasn't available. Sara at Front Desk and I talked about different ways to present patient options to get in same day.

Tool 2: Dashboard

Public scorecard.

Tells a story.

Simple - white board or posted spreadsheet.

Updated by the person responsible for the metric.

Example

Goal: Increase weekly patient count average from 350 to 400 by 11/1. (Yolanda)

10-Jul	24-Jul	31-Jul	7-Aug
14-Aug	21-Aug	28-Aug	4-Sep
11-Sep	18-Sep	25-Sep	2-Oct
9-Oct	16-Oct	23-Oct	30-Oct

Sub-Goal: Reduce no-show rate from 40 per week to 10 per week. (Cindy)

Week of	10-Jul	17-Jul	24-Jul	31-Jul	7-Aug	14-Aug	21-Aug	28-Aug	31-Jul
	4-Sep	11-Sep	18-Sep	25-Sep	2-Oct	9-Oct	16-Oct	23-Oct	30-Oct

Sub-Goal: Reduce Urgent Care visits from 37 to 5 per week. (Joan)

Week of	10-Jul	17-Jul	24-Jul	31-Jul	7-Aug	14-Aug	21-Aug	28-Aug	31-Jul
	4-Sep	11-Sep	18-Sep	25-Sep	2-Oct	9-Oct	16-Oct	23-Oct	30-Oct

Sub-Goal: Increase Dr. Blaine's average daily visit from 15 to 22. (Tara)

Week of	10-Jul	17-Jul	24-Jul	31-Jul	7-Aug	14-Aug	21-Aug	28-Aug	31-Jul
	4-Sep	11-Sep	18-Sep	25-Sep	2-Oct	9-Oct	16-Oct	23-Oct	30-Oct

Talk About it Tips

Keep it short and fun.

Don't skip it.

Delegate appropriately.

Record the meeting if people can't be there.

5. Redirect

Sometimes you don't have the right tactics.

Involve everyone.

Don't give up.

6. Celebrate

Do something special.

Recognize individual contributions.

Our Framework

1. Define your goal.
2. Make it SMARTT.
3. Form a plan.
4. Talk about it.
5. Redirect, if needed.
6. Celebrate.

Example: Patient AR

Example: Pt Complaints

What We Covered

- Dream big.
- Make it SMARTT.
- Create a Plan.
- Talk about it.
- Redirect/Celebrate.

My Promise to You

Reach practice goals.

Teamwork across departments.

Snowball effect.

Staff retention.

Decrease stress and frustration.

My Challenge to You

Pull out your calendar now - 60 min brainstorm.

Try it for 90 days with entire team.

DO NOT SKIP ANY STEPS.

My Invitation to You

Email me for a templates (agenda and dashboard).

Need help? Book 30 minutes on my calendar.

emily@altuspediatricbilling.com



What Questions Do You Have?

Keep in Touch:

emily@altuspediatricbilling.com