



HUDDLES CHECKLIST

The Objective: To consistently, per shift, allow your team to put promotions into your procedures and procedures into your promotions, while continually GROWING your practice one patient visit per shift, towards your ultimate patient visit goal

PRE-SHIFT

- ✓ **5 OBJECTIVES** – review clinics' and every team members' objectives
- ✓ **GOALS** – Set number of new patients, patient visits/week, schedule to goal . ie 200 pv = 20 np/month
- ✓ **PATIENT LIST** – Print and review patient list, assign notation to 25-100% of names FGC, Referral, gifting, care plan, collection, health pass, etc.
- ✓ **PROMO/THEME** - Power Workshops (40), nutritional product, in office event, theme of week or month
- ✓ **MLGS – Master Lead Generation Sheet** – Set goal (ie 20 calls/month) for lead names from prospects and leads from new patient packages, talks, screenings, etc.
- ✓ **REMINDERS/REACTIVATIONS**- C.A. calls to patients/previously actives – set # of calls per day
- ✓ **MAGIC**- Chimes, testimonials, free smiles, unconditional gifting
- ✓ **ABUNDANCE** – Handouts (workshops, newsletter), point of sales, business cards
- ✓ **TARGETS** – Problem patients – off care, no shows, rescheduled, balance owing

POST-SHIFT

- ✓ **What was good about today?**
- ✓ **Microtrain** – What do you need help with?
- ✓ **End Of Day Sheet** – C.A. to give to doctor - 1st adjustments, sick patients, chronic n/s (no shows) and r/s (reschedules), finances with AR's – WP1/2 etc., and NP – HIP's etc.
- ✓ **Review Next Day** – Print next day's patient list – review then or next am