



Scope of Consulting Work

Marketing

- Messaging
 - Mission, Vision
 - Value proposition
 - Unique factors
 - Naming and branding
- Overall patient experience
 - Practice from the patient's view
 - Facilities and equipment, clinical and office
 - Layout of clinic, Re-organization or remodel
 - Décor and ambiance
- Relationship development and community inroads
 - Communicating with and developing relationships with referral partners
 - Local marketing
 - Digital marketing and website development
 - Public Service employers and large employers outreach strategy and tactics

Self-Management

- Availability/access/adaptability in communication
 - Pre-scheduled weekly phone or zoom conference
 - Summary notes of action steps and conversation details
 - Open access between scheduled conferences
- Completion consciousness and training
 - Accountability for results: personal, personnel, and financial
 - Workflow analysis, reorganization as necessary and staff training
- Self-management details
 - Time management
 - Schedules and calendars
 - Prioritization
 - Work-life balance
- Personal attention provided
 - Answers to any questions
 - Supporting resources provided
 - Referrals available, if necessary



Administration and Finance

- Decision Making Framework
 - Develop strategic framework and critical business thinking skills
 - Methods of staff communication for business decisions and implementation
- Practice roadmap for long range planning
 - Develop and use monthly, quarterly and annual benchmarks
 - Expansion plan for the chiropractic department via hiring and training
 - Clinic growth strategy via massage, PT, ND, rehab/athletic training
 - Evaluation and implementation of product sales
 - Exit strategy planning
- Financial knowledge and planning
 - Understanding and managing costs and overhead
 - Understanding and using Key Performance Indicators (KPI's)
 - Debt retirement
 - Wealth accumulation
 - Investment concepts and profiles
 - Risk Management/Tolerance
- Personnel knowledge and detail
 - Become a better employer
 - Internal structure: employee handbook, procedural manuals, pay rates, benefits, reviews, job descriptions, org charts, advertising, interviewing, onboarding and training
 - Millennial values in the workplace
 - Addressing underperforming or problematic employees

Clinical Development

- Clinical Pathways and Compliance
 - Case typing and management by clinical presentation
 - Case typing by payer type: Standards of care and clinical outcome tracking
 - HIPAA: confidentiality and security
 - EHR: review and best practices
 - Review of SOAPS and exam forms
 - Review of billing practices
 - Medical necessity definitions and details
 - Coordination of exam findings with diagnostics and billing codes
 - Improved work flow, best practices
 - Delegation of services
 - Menu of services and provider types