



# **reDISCOVER**

## **2021 Leadership Summit**

### **Strategy to the Future City**



**ALLIED**  
**Physical Therapy**  
WELLNESS COMMUNITY™



# Team

## Q4 2021 Goals

**Leader: Dr. Melissa Harkness**  
**Pelvic Floor Team**

### Sheila's role

- ☐ Train her to assist with procedures
- ☐ Obtain subjective information from patient

### Reduce Cancellation Rate

- ☐ Missed appointment will be \$200 charge
- ☐ Offer option of telehealth if they can't make their appointment
- ☐ Clarity and emphasis on schedule compliance
- ☐ Therapist to be credited units for cancellations

### Treatment room setup and turn-around

- ☐ Clear process for turning rooms
- ☐ Wellness Guide / Hospitality role in assisting team

### CEU Courses

- ☐ Herman & Wallace



## Q4 2021 Goals

*Leader: Sylvia Reca*

**Develop Clear Organizational Chart and Job Descriptions:**

- ☐ Success criteria for all roles

**Develop Clear and Effective Hiring Road-map**

- ☐ Effective Careers Page
  - ☐ Component 1: What we Do
  - ☐ Component 2: How it began
  - ☐ Component 3: Ethos
  - ☐ Component 4: Strategic benefits
  - ☐ Component 5: Call to action

**7-Layer Selection Funnel**

- ☐ 1. Review resumes
- ☐ 2. Asses Fit (Kolbe Score)
- ☐ 3. Conduct Initial Virtual Interviews
- ☐ 4. Assess Skills
- ☐ 5. Conduct in-person interviews
- ☐ 6. Check References
- ☐ 7. Job offer

## Team: Q4 2021 Goals

**Leader: Sylvia Reca**

### On-boarding Success Journey

#### Checkpoint 1

- ☐ Culture immersion: Ethos training (President): Live, create a video option
- ☐ The Path Guest Journey Training
- ☐ HR on-boarding paperwork, Clinicent, email, slack, google drive, calendars, ADP
- ☐ Departmental training
  - ☐ Shadow co-worker in same position
  - ☐ Attend all department meetings
- ☐ Job Description: Clarity and review of success criteria
  - ☐ Measurable 3-5 objectives
  - ☐ Linked to ethos

#### Checkpoint 2: 30- and 60-day review

- ☐ Manager meets with new hire
- ☐ Where are you winning?
- ☐ Where are you struggling?
- ☐ Are there any road-blocks?
- ☐ Any red flags we can address?

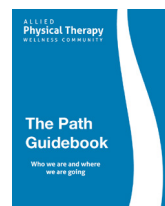
#### Checkpoint 3: 90-day review

- ☐ At 90 days, it's time for the employee and manager to connect directly. This is a great time to open the lines of communication, share feedback, get input.

**Leader: Dr. Calvin Smith**

### The Path Journey:

- ☐ Fully trained, and Roles and Processes fully implemented
- ☐ Results in 5 units per hour and 10 visits > per case.



## Team: Future Goals

- ☐ Hire FT Orthopedic Therapist
- ☐ Hire FT Pelvic Floor Therapist
- ☐ Leadership Summit preparation
- ☐ Compliance program implemented

Notes:

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# GUIDE SHOP

## Products & Services

### Q4 2021 Goals

*Leader: Dr. Rafael Rodriguez*

Create memberships:

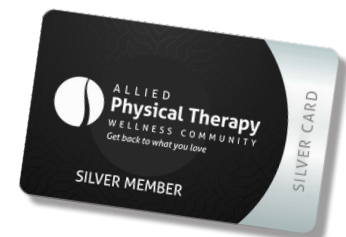
**Level 1 cost...free just be a patient**

Introduction of how we work, our team approach and the journey through our brand

- ☐ List all benefits of being a member
  - ☐ Weekly Wellness Connection
  - ☐ Monthly webinars on selected topics
  - ☐ Access to our campus
  - ☐ Monthly newsletter
  - ☐ List of our endorsed wellness providers

**Level 2: Paid**

- ☐ Nutrition program
- ☐ App for phone
- ☐ Accountability
- ☐ Execute and achieve your health goals
- ☐ Membership card with bar-code or member number to use with all purchases to track purchases and interest



## Q4 2021 Goals

*Leader: Dr. Rafael Rodriguez*

Curated Kits packaged, with instructions and benefits promise to patient on display at guide shop:

- ☐ Each therapist to establish recommended products to every patient
  - ☐ Develop a protocol
  - ☐ Create your own “program” or “guide” for how products will result in personal transformation
  - ☐ Becomes a habit, automatic
    - ☐ Dr. Matt example: All my guests are offered lumbar roll; all TMJ guests are offered TMJ kit
    - ☐ Walking program recommended for all patients; strongly recommend Quadrastep orthotics
    - ☐ Start early on mentioning the importance of products
    - ☐ Ask for sale when moment is right
    - ☐ Pretend you’re Wooly

### Nutrition Program:

- ☐ Every guest – no matter how big or small – is offered our nutrition services
  - ☐ 20%> are signing up for nutrition program
  - ☐ Train another team member to be a nutrition coach

Notes:

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## Q4 2021 Goals

**Leader: Dr. Matthew Harkness**

**Craniofacial specialty:**

- ☐ Expand to multiple clinicians
- ☐ Weekly video tip sent to CF team at Allied
- ☐ Monthly 30 min in-service led by Dr Matt
- ☐ Weekly TMJ video tip going out to our dental email list
- ☐ Referrals a week Q4: 2, Q1: 6, Q2: 10, Q3: 20

**Cascading Schedule:**

- ☐ *5 Units per hour*
- ☐ *10 Visits > per patient*

Admin meetings Hourly rate	Admin meetings Hourly rate	Unit Rate equivalent of team +Bonus	
Licensed assistants PTA	Doctors	Mentoring, system creation/adjusting, leadership meetings, admin, training	Future Focused Vision, strategy creation, leading executive leadership team
Full caseload	Full caseload	Goal 25-50% of time	
		↑↓	
f/u visits	IE/PR and Follow ups	IE/PR and Follow ups	↑↓
		Goal 50-75% of time	
Achieving Target units	Achieving Target units		IE/FU specialty or VIP patients
Unit rate	Unit Rate	Unit Rate	
Priority #1	Priority #2	Priority #3	Priority #4
Licensed assistants PTA	Doctors	Managers Leaders	Owner



## Future Goals

### A La Carte Services available with price list:

- ☐ Digital signage, website, handout, part of wellness guide instruction sheet
  - ☐ Dry needling
  - ☐ Essential oil
  - ☐ Biofreeze treatment
  - ☐ Anodyne light therapy
  - ☐ Taping (KT, other)
  - ☐ Nutrition coaching
  - ☐ E-stimulation
  - ☐ Other

Notes:

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# Sales & Marketing

## Q4 2021 Goals

***Leader: Zaida Marrero***

**Marketing Liaison**

- ☐ Develop clear job description
  - ☐ Desired results / success criteria
  - ☐ Tools available
  - ☐ Suggested actions
  - ☐ Recruit permanent Marketing Liaison

**Accountability and Focus**

- ☐ Guide teams in meetings
- ☐ Agenda
- ☐ Decisions
- ☐ Assignments
- ☐ Establish consistent meeting rhythms
- ☐ Remove barriers by clarifying, listening

## Future Goals

**Athletic Group Training**

- ☐ Infrastructure built out
  - ☐ Invitation and summary of content – printed and email
  - ☐ Sign up QR code, direct from email and printed flyer
  - ☐ Webinar or live, in-person seminar
  - ☐ Call to action to schedule appointment (immediately)

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# Envision & Execute

The “Future City” provides direction and informs our strategy. Our strategy consists of 4 parts:

**ANNUAL  
PLAN**

**QUARTERLY  
GOALS**

**WEEKLY  
OBJECTIVES**

**DAILY  
TASKS**



Traveling together in alignment and in the same direction – Team members positioned in the right seats

**FUTURE  
CITY!**

**INTERPLAY OF  
MISSION, VISION,  
STRATEGY AND  
VALUES**



Name	Defines
Mission	Who you are
Vision	Where you're going
Strategy	How you're going to get there
Values	The kind of people you are along the way