

YOUR BUSINESS IS LIKE A PATIENT,  
YOU JUST HAVE TO TREAT IT THAT WAY.

**fix  
this  
next**

The official  
supplemental  
Fix This Next Guide  
for Healthcare  
Providers

FOR

**HEALTHCARE  
PROVIDERS**

**WORKBOOK**



## Note

To use the HHN most effectively, you must treat the lowest need on the lowest rung of the HHN. Just like you're not worried about creating a legacy if you're struggling to breathe, your business cannot sustain order if you're struggling to make enough sales to stay open. Treat the lowest need first, then assess again and treat the next lowest need.

## Sales Level

- 1 **Lifestyle Congruence**  
Do you know what your billable sessions/services must be in order to support your personal financial comfort level?
- 2 **Prospect & Provider Attraction**  
Do you attract enough providers to support the demand, and do attract enough clients to support your level of needed sales- for a profitable practice (20% Net or higher)?
- 3 **Client Conversion**  
Do you convert enough of the right clients to support your level of needed billable sessions/services?
- 4 **Delivering on Commitments**  
Do you fully deliver to your clients- doing what your message promises, following through, ultimately meeting their health goals?
- 5 **Collecting on Commitments**  
Do your clients fully deliver on their commitment to you- attend sessions as scheduled, minimal no-shows, late cancels, pay promptly, etc?

## Profit Level

- 1 **Debt Eradication**  
Do you consistently remove debt from your practice rather than accumulate it?
- 2 **Margin Health**  
Do you have healthy profit margins within each of your offerings and do you continually seek ways to improve them?
- 3 **Appointment Frequency**  
Do your clients repeatedly schedule with you as recommended in their treatment plan?
- 4 **Profitable Leverage**  
When debt is used, is it used to generate predictable, increased volume and profitability?
- 5 **Cash Reserves**  
Does your practice have enough cash reserves to cover all expenses for three months or longer?

## Order Level

- 1 **Systemized**  
Do you have an ongoing and working model to reduce bottlenecks, congestion points, and inefficiencies?
- 2 **Role Alignment**  
Are people's roles and responsibilities matched to their talents effectively?
- 3 **Outcome Delegation**  
Do the people closest to the problem feel empowered to resolve it?
- 4 **Linchpin Redundancy**  
Is your practice designed to operate unabated when critical employees are unavailable?
- 5 **Problem Solving Solutions**  
Do you and your team have an effective working model for solving problems as they arise?

# THE HHN ASSESSMENT

Answer each question as accurately as possible using your practice's numbers and supplemental data. Check the box Yes or No to indicate your response.

Y N

## *Lifestyle Congruence*

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Is your practice designed to operate unabated when critical employees are unavailable?

## *Problem Solving Solutions*

Do you and your team have an effective working model for solving problems as they arise?

SALES LEVEL

PROFIT LEVEL

ORDER LEVEL

## Identify the Vital Need (Diagnosis)

Identify the most foundational level (starting with SALES, then PROFIT, then ORDER) with at least one unsatisfied Core Need. This is your current foundational level. The first unsatisfied Core Need in this level is your Diagnosis.

**What is the Foundational Level for your company's Diagnosis?**

**SALES**

**PROFIT**

**ORDER**

**My company's Diagnosis is:**

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**This is the Diagnosis because...**

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## Create the Treatment Plan for your Diagnosis

Once you have pinpointed your company's Diagnosis, the goal is to fix it. You do this by prioritizing it and concentrating resources for its resolution. To be clear, this is your number one priority and there can not be multiple number one priorities. As you concentrate on resolving the Vital Need, you do not abandon the other activities in your business. They continue as normal.

The method of addressing the Diagnosis is to create a treatment plan. With this approach, you clearly define your:

- **Presenting Problem:** The issues you need to fix
- **Diagnosis:** your business' vital need according to the HHN
- **Strengths:** What you have working for you in relation to the problem
- **Baseline:** where is your company now, based on your numbers
- **Goal:** your definition of a successful resolution of the Diagnosis
- **Intervention:** the ways you will measure your progress toward your objective
- **Plan for Progress:** the frequency you check your progress, who is responsible for each intervention, and your next steps if the current intervention does not fix the diagnosis

**\*Note\*** We recommend printing off each treatment plan you create for each diagnosis and keeping them in an online folder or a hardcover binder for reference. You can divide out each of the categories, SALES, PROFIT, ORDER, and use them as a reference when you have similar needs arise in the future.

In essence, you are developing an SOP for problems (diagnoses in your practice for your team to utilize.)

# THE TREATMENT PLAN

NOW THAT YOU UNDERSTAND YOUR BUSINESS'S DIAGNOSIS, YOU WILL  
CREATE A TREATMENT PLAN ADDRESS THE PROBLEM.

DIAGNOSIS

DATE

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**PRESENTING PROBLEM & DIAGNOSIS** Symptoms? Diagnosis according the HHN?

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**STRENGTHS** What is working well for you in relation to the problem?

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**BASELINE** Where are you now? Use metrics & data to evaluate.

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**GOAL** Where do you want to be to meet the goal of profitability?

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**INTERVENTIONS** What are the actions you going to take to get there?

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**PLAN FOR PROGRESS** When will you reevaluate and make changes if necessary? Accountability, frequency, intensity?

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# THE BASELINE

YOU MUST KNOW WHERE YOU ARE NOW IN ORDER TO ASSESS THE PROGRESS YOU'RE MAKING TOWARDS YOUR OBJECTIVE.

*Tip: Always get a baseline before putting a plan in place.*

**GATHER NUMERICAL DATA** What information is relevant to treat this diagnosis?

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**OBSERVATIONS** What are you observing that could help you determine the cause?

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**INTERVENTIONS** What interventions are already in place?

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**ACCOUNTABILITY** Who is overseeing and responsible for those interventions?

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**PROGRESS** What is working and not working right now?

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# THE GOAL

**YOU MUST HAVE A CLEAR GOAL IN SIGHT SO YOU CAN APPLY THE PROPER INTERVENTIONS. THE GOAL SHOULD DIRECTLY TIE INTO THE CORE NEED AND THE QUESTION YOU ASKED YOURSELF IN ORDER TO IDENTIFY THE DIAGNOSIS.**

*Tip: If you don't know where you're going, any road will get you there.*

**NUMERICAL GOALS** What numerical goals are you trying to achieve?

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**OBSERVATIONS** What observational goals are you trying to achieve?

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**INTENSITY & FREQUENCY** Are there necessary qualifiers? How much and how often?

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**TIMESPAN** How many days/weeks/months are you giving yourself to achieve this objective?

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**PROGRESS** How will you know when you've met this objective?

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# THE INTERVENTION

APPLY THE RIGHT FIX AT THE RIGHT TIME TO MOVE YOUR PRACTICE TOWARDS ITS GOAL.

**TIP:** Ask yourself what interventions will make the biggest impact on your practice in the shortest amount of time.

**PROBLEM** What is the problem we are trying to solve?

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**ASSUMPTIONS** What is the strongest assumption you have about this problem?

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**INTERVENTIONS** What FIXES are most likely to help you reach your goal? List in order of priority.

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**ACCOUNTABILITY** Who will be responsible for each intervention and what will the quality assurance process look like?

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# PLAN for PROGRESS

**YOU MUST CONTINUALLY EVALUATE THE FIX YOU'VE APPLIED IN ORDER TO DETERMINE IF CHANGES NEED TO BE MADE.**

*Tip: By assigning a date for reevaluation, you are increasing the effectiveness of the FIX.*

**RESULTS** What was the results of the applied interventions?

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**TWEAKS** What tweaks are needed to further enhance the effectiveness of the interventions?

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**ACCOUNTABILITY** Who was responsible for each interventions and does that need to change?

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**NEXT STEPS** What do the next steps need to be in order to achieve the goal?

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# The Treatment Plan

NOW THAT YOU UNDERSTAND YOUR BUSINESS'S DIAGNOSIS, YOU WILL CREATE A TREATMENT PLAN ADDRESS THE PROBLEM.

DIAGNOSIS/LEVEL

Lifestyle Congruence/SALES

DATE

The Best Day Ever

**PRESENTING PROBLEM** Symptoms? Diagnosis according the HHN?

Sara is feeling overwhelmed and starting to get burnt out. She's not clear on her practice's numbers, and she doesn't know how many billable sessions she needs to meet her personal lifestyle congruence.

**STRENGTHS**

Sara has a good system for tracking her money and knows exactly what she needs to meet the goal.

**BASELINE** Where are you now? Use metrics & data to evaluate.

Sara knows she needs to make \$5,000 per month in order to pay her bills and cover all her personal expenses. She uses the Profit First model and allocates 20% for Owner's Compensation. Sara needs to figure out how much gross revenue the practice needs to generate in order for her 20% allocation to equal \$100,000.

**GOAL** Restate the question related to the diagnosis.

Goal: Sara will determine the number of billable sessions needed per month in order to meet her Lifestyle Congruence of \$5,000.

**INTERVENTIONS** What are the actions you going to take to get there?

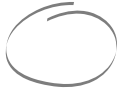











- Sara will use the billable session formula to determine all components necessary to reach the goal. Divide (desired salary) by PF allocation percentage = gross revenue needed
- Divide the total gross needed by 12 months to get the monthly gross revenue needed
- Divide the monthly total by the average service reimbursement rate to get the total number of sessions per month
- Divide the total number of sessions per month by 4 weeks to get the total per week needed
- Create a dashboard to track weekly sessions to ensure you are on track

**PLAN FOR PROGRESS** When will you reevaluate and make changes if necessary?

Check the dashboard weekly to evaluate progress and ensure the number of sessions needed are being performed. After the first month of tracking, re-evaluate your Lifestyle Congruence to make sure it is still accurate and nothing needs to be adjusted.

# IDENTIFYING BOTTLENECKS

**LIST ALL THE STEPS IN THE PROCESS**





















**FINAL STEP: PUT A "B" BESIDE ANY AND ALL BOTTLENECKS.**

# THE BIGGEST PROBLEM

ARE YOU A BOTTLENECK? USE THE FOLLOWING WORKSHEET TO DETERMINE WHAT SYSTEMS CANNOT RUN WITHOUT YOU AND WHICH EMPLOYEES YOU CAN EMPOWER TO SOLVE PROBLEMS IN THEIR DEPARTMENTS.

## REASONS PEOPLE EMAIL, TEXT, OR CALL YOU

FOR ONE DAY, ON THE LINES BELOW, WRITE DOWN THE SUBJECT OF ALL THE EMAILS, PHONE CALLS, AND TEXTS YOU RECEIVE.

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	<input type="text"/>		<input type="text"/>
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## TALLY THE CATEGORIES

CATEGORIZE AND COUNT THE TOPICS ABOVE AND PUT THEM INTO THIS CHART. WHICH CATEGORY CONSUMES MOST OF YOUR TIME?

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# SURVEYING THE STAFF

**WE VALUE YOUR OPINION, AND WE KNOW THAT NO ONE KNOWS YOUR ROLE LIKE YOU DO.**

Instructions: Complete the following questionnaire to help us structure the processes around your position in a way that will maximize your effectiveness and efficiency.

**1= strongly disagree 5- strongly agree**

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I am able to complete my daily tasks without being pulled in several different directions.

1 — 2 — 3 — 4 — 5

I have to wait for certain people to approve my work, authorize a transaction, etc. before I am able to complete a certain task.

1 — 2 — 3 — 4 — 5

I feel empowered to solve problems in my own department of the company and feel supported in my decisions.

1 — 2 — 3 — 4 — 5

I have to multi-task regularly in order to complete the tasks that are assigned to me daily.

1 — 2 — 3 — 4 — 5

If I could change certain processes within my department, I'm confident that I could be much more efficient.

1 — 2 — 3 — 4 — 5

# CLIENT SATISFACTION SURVEY

These are the questions we ask clients of Mindsight Behavioral Group. We recommend using something like Google Forms or Typeform to create a user-friendly and professional-looking form that your clients can easily access from their phone or computer.

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1. At which of our locations were you seen?
2. What was the name of the therapist you saw?
3. Please rate your overall experience (1-5).
4. Are you satisfied with the quality of care you received?
5. Did your therapist listen to what you were trying to get across?
6. Did your therapist provide an adequate explanation of your therapy?
7. Did your therapist seem to understand what you were thinking and feeling?
8. Do you have a clear idea of the goals you, your therapist, and your treatment team are working to achieve?
9. Does your therapist exhibit professionalism in their wardrobe?
10. Does your therapist exhibit professionalism in the language and conduct they use when speaking with you?
11. Was the office comfortable and inviting?
12. Is your therapist easy to reach and communicate with?
13. Do you feel like your therapist is a good match for you and your needs?
14. Do you feel like Mindsight cares about you and your wellness?
15. Based on your experience, would you recommend Mindsight to a friend or family member?
16. Is there anything else you'd like us to know about your experience with Mindsight?
17. Would you like someone to contact you regarding your feedback?
18. What is the best way to contact you?
19. What is your email address and/or phone number?



# MATCHING TASKS TO TALENTS

## QUESTIONS FOR REFLECTION

- What tasks must be completed for your practice to operate?
- What talents do your staff members have that might help you accomplish those tasks? Don't be afraid to ask them. Think outside the box on this and try not to be influenced by their titles.
- Once you've written those down, try to match your staff members to tasks that they will enjoy and be good at based on their talents.

	STAFF NAMES		STAFF TALENTS
☉		→	
☉		→	
☉		→	
☉		→	
☉		→	
☉		→	

	ROLES/POSITIONS		BEST SUITED STAFF FOR TASK
☉		☉	
☉		☉	
☉		☉	
☉		☉	
☉		☉	
☉		☉	
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☉		☉	
☉		☉	
☉		☉	

# SWAPPING STAFF

Once you staff members have documented the processes in their position, it is helpful to swap roles. There are two goals for this. One, have the team member follow the set of steps outlined by the person in the position they are swapping for. They will begin to see gaps, bottlenecks, and congestion points.

Two, you will be cross-training staff so that if one employee is unavailable someone else can easily move into that role for coverage.

YOUR NAME

YOUR ROLE

ROLE YOU SWAPPED

OBSERVATIONS OF THE SWAP

WHAT QUESTIONS DID YOU HAVE?

WHAT BOTTLENECKS DID YOU FIND AND HOW DO YOU PLAN TO ADDRESS THEM?

# THE PASS METHOD

**HAVING A CONSISTENT AND PREDICTABLE METHOD FOR YOUR TEAM TO SOLVE PROBLEMS IS GAME-CHANGING.**

## WHAT IS THE PASS METHOD?

The PASS Method is a straightforward way to talk out a problem. This method works best in a team environment where every team member feels empowered to propose assumptions, solutions, and strategies, and also "poke holes" in others' logic, assumptions, and strategies.

PASS stands for

- Problem & Perceived Result
- Assumptions
- Solution
- Strategies

## HOW TO USE THE PASS METHOD

1. Define the problem. Ask yourself, "What will happen if the problem continues?"
2. What do you assume is causing the problem? Which assumption seems most correct? Are there multiple assumptions that seem likely?
3. Choose the most likely assumed cause and create a list of possible solutions. Create strategies for each of the proposed solutions. Then select the solution/strategy that is most likely to work and most likely to make the biggest impact.
4. Follow up. Assign tasks as needed to solve the problem. Set a deadline for progress or completion. Be sure to also assign someone to hold everyone accountable until the project is finished.

# THE PASS METHOD

## QUESTIONS FOR REFLECTION.

What is the problem?

What are the outcomes if the problem continues?

List possible solutions based on each assumed cause.

	ASSUMED CAUSE		POSSIBLE SOLUTION
👤		👤	
👤		👤	
👤		👤	
👤		👤	
👤		👤	
👤		👤	
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## CREATE A STRATEGY TO SOLVE THE PROBLEM BASED ON THE STRONGEST ASSUMPTION.

Strongest Assumption:

Strategy:

How will we track our progress?

Accountability(*who is responsible, what are they responsible for, deadlines*):

# THE PASS METHOD

## QUESTIONS FOR REFLECTION.

**What is the problem?**




Productivity is low.

**What are the outcomes if the problem continues?**




If Mindsight doesn't increase productivity by at least 15 percent, we cannot support the current number of support staff, and layoffs will become the only solution.

List possible solutions based on each assumed cause.

### ASSUMED CAUSE

-  Referral sources aren't seeing as many clients and are spending as little time as possible with them because of Coronavirus.
-  Clients don't realize Mindsight is open to see clients via telehealth.
-  Clients don't know what telehealth is or that it is an option for them.

### POSSIBLE SOLUTION

-  Create a text-to-talk campaign that referral sources can give to clients without handing them a flyer
-  Fax a flyer to every referral source with our contact information and our hours, noting that telehealth is available.
-  Create a social media campaign to raise awareness of telehealth

## CREATE A STRATEGY TO SOLVE THE PROBLEM BASED ON THE STRONGEST ASSUMPTION.

**Strongest Assumption:** Referral sources are spending as little time as possible with clients because of Coronavirus.

**Strategy:** Text to talk campaign for those who need mental health care quickly

**How will we track our progress?** We will monitor the number of referrals coming in daily. We will also monitor the engagement of posts on our social media.

**Accountability (who is responsible, what are they responsible for, deadlines):**

- Marketing will create the campaign, including flyers and social media posts
- Client Care will send the flyers to all referral sources and follow up with a phone call to make sure they received it and understand the information.

# COMMON INTERVENTIONS

## SALES INTERVENTIONS

### *Lifestyle Congruence*

- Utilize a bookkeeper, accountant, or CPA to help you determine if productivity goals match your financial needs.
- Evaluate current productivity to establish a baseline.
- Determine what's really necessary to live the lifestyle you desire.
- Examine your monthly expenses. What is unnecessary and not moving your business toward its goal of profitability?
- Determine the deficit, the gap between what you need and what you have.

### *Prospect & Provider Attraction*

- Prospect Attraction
  - Create a viral social media campaign — use what's going on in your community as leverage to reach people.
  - Use hashtags that potential prospects or providers may be searching for.
  - Take a strong stance in your social media.
  - Implement a Text to Talk Campaign.
  - Utilize local billboards
  - Develop relationships with other community partners and refer to each other when possible.
  - Make screening potential referrals easy for your community partners. Give them a quick checklist or assessment they could have their patients complete.
- Provider Attraction
  - Build a reputation for behaving ethically and putting patients first by providing workshops teaching core skills for professionals in your area.
  - Find something unique to become known for.
  - Stand out.
  - Create a culture where your team is excited to come to work.
  - Offer recruitment bonuses for current staff to entice former colleagues.
  - Implement sign-on bonuses that are paid out over the course of their first year.
  - Offer to assist new hires in paying for an area of specialization or certification
  - Invest in your providers professionally.
  - Create a virtual job fair and circulate it to the local chambers of commerce, hiring companies, universities, adult education centers, and anywhere else that would be likely to share it.

# COMMON INTERVENTIONS

## SALES INTERVENTIONS, continued.

### *Client Conversion*

- Create your ideal client avatar and market specifically to them. When you market to those that are in alignment with the goals of your practice, your conversion rate will instantly improve.
- Be clear on the insurances you accept on your website/other marketing
- Be specific about what you offer patients so you spend less time turning away "unqualified" clients.
- Smooth out the bumps in your intake process, such as bottlenecks and congestion points. Find the places where the workflow slows down and address it.
- Have scripts available to address each objection a client could have so you are prepared and confident in your answer.
- Use client-centered language on your website and marketing materials. Overly clinical copy can confuse clients and make them feel inadequate before they ever get to you.

### *Delivering on Commitments*

- Create standard operating procedures to ensure consistent care throughout the company. Store these on a shared document or folder along with videos in addition to text.
- Schedule weekly meetings with your team to check in on their adherence to delivering on commitments.
- Add this section as a part of their employee performance evaluation in order to properly hold them accountable and give them something to work towards.
- Make sure that each employee is clear on the goals of their position, and measure their progress and success in meeting them.
- Perform clinical quality assurance checks for every provider on your team.
- Educate your team on what this concept means.
- Make sure this is included in your company's overall mission statement.

### *Collecting on Commitments*

- Conduct patient surveys to see if patients continue to work on their treatment plan after they leave your office.
- Put thorough policies in place to prevent no-shows or late cancellations.
- Train your reception staff to reschedule appointments instead of canceling.
- Put systems in place to track payments from insurance companies to ensure timely filing and receiving of payments.

# COMMON INTERVENTIONS

## PROFIT INTERVENTIONS

### *Debt Eradication*

- Put a plan in place to eliminate as much debt as possible by cutting unnecessary expenses.
- Create a budget to ensure your company runs on the revenue it generates.
- Review all current expenses and find ways to cut costs within the organization. Take the savings and put them toward the elimination of debt so you can reduce it at a much faster pace.
- Set up a plan to pay more than the minimum payment for all high interest-bearing accounts.
- Seek out ways to consolidate debt if possible
- Look into refinancing options that will reduce the overall cost of the item or service you're purchasing.
- Transfer high outstanding balances to a 0 percent APR credit card until you can leverage the debt in other ways to increase profit.
- Utilize a monthly budget to restrict yourself from spending money on unnecessary expenses that will not increase your revenue or add to your profit margins.

### *Margin Health*

- Figure out how profitable each of your offerings is.
- Find ways to maximize services that produce the most revenue and optimize the services that don't produce revenue or as much revenue immediately.
- Consider raising rates to increase revenue.
- Avoid discounting the price of your service or offering unless there is a strategic way to leverage the loss for increased volume.
- Elevate your brand and increase the perceived value of the services you have to offer.
- Request rate increases from all the insurance and EAP programs you currently work with.
- Streamline your operations in order to reduce expenses and improve margin health.
- Consider other services, products, or offerings within your practice that you can add on to the existing services.
- Identify and eliminate waste within the practice.
- Explore the untapped potential of your employees. Can they do something to increase profitability based on their skill set?
- Look at retention rates. The lower your acquisition costs, the greater your profit margins will be.
- Cut out the low payers.



# COMMON INTERVENTIONS

## PROFIT INTERVENTIONS, continued.

### *Appointment Frequency*

- Track retention rates to see how often your patients return to your practice.
- Put a plan in place for having standing appointments for all patients and providers within the organization.
- Use scheduling strategies such as scheduling from noon backward.
- Use appointment confirmations to secure appointments and provide an opportunity to replace the patient if they can no longer make the appointment.
- Implement patient-led appointment scheduling features so they can make their own appointments while cutting down on staff time used for scheduling.
- Offer more services that would benefit your ideal client
- Create a system to schedule recurring, regular appointments whenever possible.
- Use patient Re-care and Recall, calling back on previous patients that haven't been seen recently.

### *Profitable Leverage*

- To maximize leverage and make a gain, you need to make more money than you borrow plus the interest on the debt. Acquiring financial leverage isn't the goal. If you want to maximize profits with financial leverage, the key is to only borrow money that you believe can lead to increases in earnings beyond the full cost of the loan.
- Figure up the ROI on borrowed money after thirty days, ninety days, and one hundred twenty days.
- Set boundaries for yourself to ensure any new debt will generate predictable increased profit.
- Put a plan in place to quickly pay off new debt.

### *Cash Reserves*

- Determine your operating expenses for six months. That is your cash reserves goal.
- Raise your rates to increase revenue. Put the difference of the increase toward your cash reserves goal.
- Rent out unused office space to professionals that complement the services you already offer.
- Redirect cash flow from one area of the business to your cash reserves temporarily.
- Find ways to tighten the budget. What can you temporarily live without or put off purchasing until after the cash reserves are secure?
- Negotiate rates with insurance companies, your landlords, your utility companies, etc, to find extra funds to put into your reserves.
- To prevent unnecessary withdrawals from this fund, move the cash reserves to another bank, or add another signer onto the account.

# COMMON INTERVENTIONS

## ORDER INTERVENTIONS

### *Systemized*

- Teach each staff member the goal of their role in the company and help them prioritize the tasks that help them accomplish the goal.
- Ask each employee to list their process for each task within their role. Review the steps in the process and help them determine what is not necessary or slowing the process down.
- To increase efficiency and improve margin health, streamline processes by reducing as many steps as possible.
- Automate steps in your processes to take the human involvement out. This further increases your profit margins and reduces the likelihood of error.
- Delegate tasks that can be done by others so you can focus your time on things that others cannot do.
- Eliminate any tasks that are not necessary and not contributing to your goal of profitability.
- Empower staff members to find more efficient ways to complete tasks without compromising their goal or patient care.
- Occasionally observe systems to catch bottlenecks and congestion points.

### *Role Alignment*

- Find out your employees' skills and strengths through the use of the DiSC, How to Fascinate, Clifton StrengthsFinder, Myers-Briggs Type Indicator, the Enneagram, or any other assessment designed to enhance productivity in the workplace.
- Use the results of these assessment measures to ensure that your staff are matched appropriately to their daily tasks.
- Whenever possible, align their roles with tasks they enjoy and are successful in.
- Reassign tasks that are clearly not in an employee's wheelhouse whenever possible.
- Implement a quarterly one-on-one meeting with each of your team members to review their productivity, effectiveness, and commitment to the position they are currently placed in.
- Promote people based on their skillset and the ROI they bring to the company.
- Encourage employees and remind them of the company's "why" and how they can contribute to that.
- Help employees express their future plans within the company and the action steps necessary in order to help them get there.
- Coach each employee based on whether they are driven by their need for achievement, affiliation, or power.
- Employ a strategy for sustaining momentum and success: daily meetings, quick wins, team building activities, annual retreats, unexpected incentives, public praise, etc.

# COMMON INTERVENTIONS

## ORDER INTERVENTIONS, continued.

### *Outcome Delegation*

- Empower your team to identify and solve problems within their own department.
- Clearly articulate the desired outcomes you have for each task or project within the company.
- Remove yourself from the process and allow responsibility for the outcome to rest with your team.
- Teach your team to give, receive, and solicit healthy feedback to and from one another through the process.
- Delegate to the lowest level of organizational development.
- Make sure to match the amount of responsibility with the amount of authority when assigning a task.
- Look at who is the most motivated to successfully complete the task and assign it to them.
- Use the four-step method for delegating:
  - **Assess:** who is most motivated to complete this task and who has the ability to do the task?
  - **Set Expectations:** what do they need to do and what does successful completion of this task look like?
  - **Provide Support:** what authority does this person need to have to complete this task, how will you monitor progress and communicate throughout, and what will praise look like when this person completes this task successfully?
  - **Follow up:** does the employee clearly understand the expectations?

### *Linchpin Redundancy*

- Consider what information your employees have that you don't have (passwords, keys, documents, etc)
- Create a plan to centralize and share those resources so everyone who needs access can acquire access.
- Create clear, concise, and usable standard operating procedures
- Have employees switch roles in a controlled environment for a certain amount of time to test the clarity of the SOPs. Take any questions generated during the exercise and use them to revise the SOPs. Keep the SOPs on file and frequently updated so they can be used if needed.
- Train at least on "backup" for every key role in the company.

### *Problem-Solving Solutions*

- Implement the PASS Method (TM)
- Require your team to track problems versus solutions and discuss the impact.
- Facilitate brainstorming sessions to help your team generate strategies to elicit change.
- Praise employees for offering solutions to problems independently.

# COMMON FORMULAS

## Lifestyle Congruence

Determine how much **monthly** income you need to maintain your desired lifestyle. Multiply that number by twelve. That is your goal yearly salary.

Next, determine how much revenue your company needs to bring in to support your salary. Your salary should be 20% of the company's revenue.

$$.20 \times (X) = (Y)$$

x = total company revenue and your lifestyle congruence number.

Y = Your goal yearly salary

## Client Acquisition Cost

Questions to consider:

1. What is the average client acquisition cost in your area?
2. How much do you charge per session?
3. How much do you pay each provider per session?
4. How much do you spend on overhead costs per session?
5. How many sessions does it take to break even?

For example:

*If your CAC is \$100, you pay your provider \$50/session and you have \$15 in overhead/session, this is how the numbers shake out.*

*Session 1: \$100 CAC + \$50 for therapist + \$15 overhead = -\$165*

*Session 2: - \$100*

*Session 3: - \$35*

*Session 4: + \$30*

*Session 5: + \$35*

*It takes 4 sessions to break even and more to become profitable.*



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