



BUSINESS SYSTEMS SURVEY & CHECKLIST FOR PROFITABLE NATUROPATHIC PRACTICES

 **Metro**
Health & Wellness
Professional Business Coaching

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BUSINESS SYSTEMS SURVEY & CHECKLIST FOR PROFITABLE NATUROPATHIC PRACTICE

Are business systems your weakest link/skillset? Do have a clear vision for exactly what you need to put into place to accelerate your practice growth?

The following survey and check-list will help you assess the most important business systems, structures, and process the best Naturopathic practices have in place.

First let's start with you. Where are you with yourself? Then, we'll check in with your business.

- ☐ I often feel scattered, not sure what to work on, get easily distracted and end up trying to handle too many things at once without fully completing any of them.
- ☐ I feel like I need to be more organized, but not sure how to do it or what to get organized..
- ☐ I have so many different and good ideas that I want to do with my business, I just can't seem to get them off the ground or make any headway with them.
- ☐ I feel overwhelmed much of the time..
- ☐ I'm not making enough money.
- ☐ I don't know where to find new clients or how to attract them. I need more new clients.
- ☐ I seem to generate a decent income, but I am still broke at the end of the month and I am not sure where all the money goes.
- ☐ I know I am capable of more and I'd like to scale my business beyond me but don't quite know how to do it or even what to do at this point.
- ☐ answered NO to all of the questions above because things are good for me right now, I'd just like to find out what I'm missing so that I can improve the results I am currently getting and move from good to great. I'd like to increase my goal and I think I might need help achieving it.
- ☐ I believe in myself, and I have a lot of courage.
- ☐ I am passionate about my profession. I am so committed to helping others.
- ☐ I get discouraged if I don't see results right away. I think I may be doing something wrong, or I am not good enough..

Up level your own attitudes, mindset, perspectives to empower you naturally, to get out of your own way, to overcome your fears and achieve. Request your [Free Business Analysis Session](https://metromm.com/free-resources/business-analysis)

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Your practice requires several types of systems to run smoothly and profitably resulting in you having time for your life.

Strategic Planning

- ☐ Have a documented vision for my business. ☐ 3-year. ☐ 5-year. ☐ 10-year.
- ☐ Have a documented business plan for each year.
- ☐ You/your team are following it.
- ☐ Documented strategic & measurable annual goals.
- ☐ Track business results and performance indicators regularly.
- ☐ Have weekly and monthly planning sessions with myself or with staff and adjust our actions accordingly if needed.
- ☐ Have effective accountability system(s), or business coach, for achieving my goals.
- ☐ Have documented marketing plan and implement it.
- ☐ Know how to attract highly qualified leads

Time Management

- ☐ Have my workweek organized with effective time management structures. I use a calendar to schedule all of my actions and priorities.
- ☐ Have a set, consistent schedule for working the admin, management, financial and other business functions of my practice.
- ☐ I am maintaining a high work-life balance.
- ☐ My patient/client schedule is very workable for smooth flowing operation.
- ☐ I let my patients dictate my schedule and the days or hours I work. They can schedule whenever they want. My schedule is wide open for them so because I want it to be super convenient for them.

Financial

- ☐ Have a workable and balanced business budget with revenue, savings (profit) and expense targets.
- ☐ I maintain and track my business budget weekly/monthly.
- ☐ I produce a profit monthly and set this aside in a separate banking account.
- ☐ I pay myself a regular salary that is at market rate for doctors or practitioners of my caliber.
- ☐ Have workable bookkeeping system where I review reports and transactions and least monthly.
- ☐ I have a relationship with a local banker.

Management

- ☐ Have staff development, incentive, and/or promotion programs.
- ☐ Have documented Standard Operating Procedures and Employee/Staff Handbook with policies, procedures, and protocols including job descriptions and production expectations.
- ☐ Have specific tasks and function documented with procedures and check lists
- ☐ Have regular (at least monthly) staff meetings with admin and professional staff.
- ☐ Everyone is on the same page and committed to the strategic goals and vision of the practice.
- ☐ Have effective, easy-to-use, internal staff communication process and system in place.

Patient Management

- ☐ Have digital platforms and portals for patient information management, easy communication and record keeping and on-boarding forms.
- ☐ Have clear and organized intake onboarding process that is consistently followed.
- ☐ Have immediate patient communication systems both tangible and digital for welcoming, giving further directions, educating and loyalty.
- ☐ Have an on-going, preferably automated or semi-automated, patient/client communication process for education, client retention and supporting their treatment plan.
- ☐ Have a low-barrier consultation process with a designed structure, questions to ask, and flow that allows new prospects to strongly say Yes to working with you/your team.
- ☐ Have excellent client/patient retention results.

Marketing

See Marketing Checklist in [Free Resources download page](#).

Get valuable answers to questions or concerns you have about your practice and how you can massively improve your effectiveness at growing, scaling or operating your business.

Request & Schedule your private, enlightening, Business Analysis – Strategy Session
Call today: 877.239.0340

Or Go to: Metromm.com/Free-resources/Business-Analysis