

CB Monthly Management Meeting Agenda

COACH BARROW

Finance

- Review of profit & loss statement for previous month & year to date
- 12-month cash flow - comparison of budget versus actual
- Key Performance Indicators
- Average Daily Production of fee-earners
- Profitability of fee-earners
- Return on Investment from marketing activities
- TCO conversion numbers

Marketing

- Overall progress of marketing plan
- Web site review and analytics
- Online Reviews
- Social media connection and engagement
- Word of mouth results
- Testimonials
- Direct marketing review
- Networking review
- B2B - B2C review
- Study Club development

The Patient Experience

- Online booking
- Telephony
- Front Desk
- TCO
 - o Treatment delivered
 - o Up-selling
 - o Pipeline management
 - o Word of Mouth
- End of Treatment Conversation
- Membership

Operational

- Clinical issues
- Non-clinical issues
- Governance and Compliance
- Clinical Mentoring

Personnel

- Review of team performance
- Review of individual performance
- Review of bonus system year to date
- Schedule of team meetings
- Training issues
- Personal Progress Interviews

Strategy

- Tactics for growth
- Acquisitions
- Product mix
- Patient demographics
- Delivery models
- Expansion strategy
- Exit strategy
- Personal/professional time management