

# **BREAKTHROUGH<sup>®</sup>** COACHING **Weekly Team Meeting Template**

Date:	Time:	Meeting Leader	Action Tracker	FTA / Timer	Team Members Attending
-------	-------	----------------	----------------	-------------	------------------------

<b>2-Minute Inspiration</b> <i>(BTC Quotes of the Week, short thought, acknowledgement for team members, or mission statement review)(2 min.)</i>

<b>Statistics</b> <i>(Bolded statistics are reported to coach.) (8 min.)</i>														
OV	NP	ROF	Reacti vated	Missed Apt. %	OVA	Total Scheduled OV	Services Rendered	FD Collect	Total Ins. Collect	Write Offs / Credits	% NP Finance Agree	Passive Units	Passive / OV	Pt. Satis. (509)
								Total Collect		Accounts Receive %		Active Units	Active /OV	
<b>Statistic Goals for Next Week</b>														

<b>New Patient Review</b> <i>(Write in NP names and referral source. Review NP spreadsheet. Review last week, four weeks, eight weeks )(8 min)</i>

<b>Practice Successes this Week</b> <i>(Patient testimonials or successes) (2 min.)</i>	<b>Presenter(s):</b>
<b>Practice Challenges / Team Solution</b> <i>(5 min.)</i>	
Problem:	
Solution:	

<b>Foundation Marketing</b> <i>(10 min.)</i>				
<input type="checkbox"/> Condition of the Week	Topic		Date	Time
<input type="checkbox"/> New Patient Workshop	# Attending			
<input type="checkbox"/> Professional Lunch	Guest			
<input type="checkbox"/> Lecture/Screening	Location			
<input type="checkbox"/> Corporate Health Fair	Location			
<input type="checkbox"/> e-Newsletter focus	Topic			
<input type="checkbox"/> MD Marketing Program	# of MDs			
<input type="checkbox"/> Attorney Fax Briefs	# of Attorneys			
<input type="checkbox"/> 4-Card Day	Date			
<b>Quick Review of Upcoming Marketing Events / BTC Marketing Calendar</b> <i>(Refer to 90 Day Rolling Marketing Planner found in the marketing manual for details. Record action items.)</i>				

<b>Practice Short-Range and Long-Range Vision</b> <i>(6 min.) (Refer to goal section for details. Record relevant action items, owners, and dates on the reverse side.)</i>
Short Range Goal:
Long Range Goal:

<b>Schedule Departmental Meetings</b> <i>(Once a month minimum)</i>				
Insurance	Rehab	Administration	Front Desk	Marketing
<b>Individual Comments / Business / Scheduling / Zone for Week</b>				

[illegible]

<b>Today's Departmental Training Topic(s) (5 min.)</b>	
	Presenter:
	Presenter:
<b>Next Week's Departmental Training Topic(s)</b>	
	Presenter:
	Presenter: