



A Suggested Agenda Plan

An initial meeting of the doctor and the practice manager should be conducted to cover the following items:

- An understanding there are special challenging times ahead and no matter how comfortable you are with your practice's performance there is a need for an Action Plan for the current situation..
- The best day to conduct a 45 minute meeting with the agenda prepared and updated by the manager in advance.
- The monthly targets for consultations and surgeries should be established.
- The special marketing assignments to be given to the staff for the next 90 days
- The medical and marketing training needs of the staff should be reviewed in light of the new economy's requirement for better service presentations.
- The dates that the doctor will conduct the 'Lunch and Learn' sessions with the staff to improve their knowledge of the key featured procedures.
- The Marketing plan's assignments and events for this period should be reviewed. No matter how informal the marketing plan is there needs to be a plan with a budget. These are tough times!
- Revenue and expense targets specific to each upcoming six months should be forecasted.

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Meeting Agenda for Doctor and Practice Manager

- I.** Review the notes that have been prepared in advance by the practice manager from the previous meeting. The notes should be presented to the doctor in advance.
- II.** Review revenue received for the previous week against the target
- III.** Review major expenses for the upcoming week against the target
- IV.** Review of major staff assignments
- V.** Review of the practice Marketing Indices
 - a. Status of consults from previous week against the target
 - b. Status of surgeries scheduled from previous week against the target
 - c. Closure of phone inquiries from previous week against the target
 - d. Closure of E-MAIL inquiries from previous week against the target
 - e. Consultations scheduled for the current week-
 - f. Confirm that all have been confirmed
 - g. Confirm that each patient's motives are understood and there is a plan to work the patient's hot buttons
- VI.** Status of special events and projects for the week
- VII.** Examine the needs for any special projects to address a problem or new activities

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