ACCOUNTABILITY GRID

REMARKABLE!™

ATTRACTION
(MARKETING)

Internal
- Organic Referrals
- Process-Driven
- Campaign-Driven

External
- Networking
- Outside Events
- Traditional MKT

Digital
- Website/SEO
- Email Marketing
- Social Media

Domain Score

CONVERSION
(SALES)

Day 1
- Emp Connection
- Consultation/Recap
- Examination

Day 2
- ROF
- Recs for Care
- Financials

Day 3
- E & A
- Policies
- Patient Training

Domain Score

RETENTION
(DELIVERY)

Continuing Education
- Table Talk
- Workshop
- Progress Report

Clinical Care
- Examination
- Clinical Care/ ADJ
- Other Services

Long-Term Care
- Re-Examination
- Re-Recs
- Re-Commitments

Domain Score

TEAM BUILDING
(HUMAN RESOURCES)

Human Resources
- Hiring / Onboarding
- Discipline / Firing
- Team Management

Training
- CA Training
- DC Training
- Development

Productivity
- Runs the Team
- Manages the Team
- Holds Team Acct

Domain Score

COLLECTIONS
(MONEY)

Financial Plans
- Payment Plans
- Collections/OTC/EFT
- Insurance

Cash Flow
- Money In (Income)
- Money Out (Bills)
- Banking/Ck Book

Profit
- Bookkeeping
- Accounting/Taxes
- Cash Flow/Profit

Domain Score

For each of the 15 Primary Functions, ask the following two questions:

1. Is it optimized? (Hitting your goals?) Score 0–10.
2. Who owns it? (Team member accountable). Initials _____.

See domain average score tallied at bottom.

ACCOUNTABILITY GRID

REMARKABLE! ™

OPERATIONS METRICS

FINANCIAL METRICS

ATTRACTION (MARKETING)

Operations Metrics
- (INT LEADS) Internal Leads (#)
- (EXT LEADS) External Leads (#)
- (DIG LEADS) Digital Leads (#)
- (SHOW%) Day 1 Show Rate
- (REACTS) Reactivations (%)

Financial Metrics
- (CPL) Cost Per Lead
- (CPA) Cost Per Acquisition / (CAC) Cost To Acquire a Customer
- (LTV) Life Time Value
- (ROI) Return On Investment
- (ROAS) Return On Ad Spend

CONVERSION (SALES)

Operations Metrics
- (R72) Rule of 72 (%) EX: TTC (Time To Close)
- (D2SR) Day 2 Stick Rate
- (NPC%) NP Conv Rate
- (NPC#) NP Conversions
- Reactivations (#)

RETENTION (DELIVERY)

Operations Metrics
- (SR) Stick Rate (by Visit / Month / Milestone)
- (COMPL %) Compliance % Or (KVA) Kept Visit Average
- (IA) Inactives (#) Or (CHURN%) Churn Rate
- (NET MO) Net Momentum
- (TAP) Total Active Patients

TEAM BUILDING (HUMAN RESOURCES)

Operations Metrics
- (EMP) Stick Mo
- (RPE) Revenue Per Employee
- (FTE) Full Time Employee Equivalents
- (ENPS) Employee Net Promoter Score
- (TAP) Total Active Patients

COLLECTIONS (MONEY)

Operations Metrics
- (COL) Collections ($)
- (CVA) Collection Visit Average ($)
- (MRR) Monthly Recurring Revenue ($)
- (MRR) Monthly Recurring Revenue (%)
- (COL%) Percent Collected (vs. Billed or Goal) (%)

Financial Metrics
- (REV) Revenue
- (REV GROWTH%) Revenue Growth (YOY)
- (PROF$) Profit ($)
- (PROF MARGIN%) Profit Margin (%)
- (LTV) Life Time Value ($) Or (CASE AVER) Case Average