

Owner's Meeting

The owner's meeting is intended for owners to discuss the same information and stats from the management meeting. This includes the stats, goals, marketing, Project, and other rudimentary subject updates.

1. Follow up on/report back on from last meeting
 - a.
 - b.
 - c.
 - d.

2. Stats
 - a. Quarterly production, collections, new patients
 - b. Quarterly number of active patients
 - c. Comparison with last year's numbers
 - d. Any other stats we want to review?
 - e. Any other stats we want to start tracking?

3. Goals
 - a. Current productivity
 - b. Desired growth/expansion
 - c. Additional specialty training
 - d. Additional products/services to offer

4. Marketing
 - a. Marketing budget
 - b. Effectiveness of existing marketing efforts
 - c. New outreach activities to initiate
 - d. Allocation of staff and owner time for marketing activities
 - e. Review next 12 months of marketing calendar

5. Projects
 - a. Work being done with consultant
 - b. Job descriptions/office policy
 - c. Systems
 - d. Tracking
 - e. Other projects being done to grow the practice

6. Rudimentary subjects
 - a. Licensing



- b. Continuing education
 - c. Taxes
 - d. Legal matters
 - e. Building
 - f. Equipment
 - g. Insurance
 - h. Financial reserves
 - i. Security
7. Check into before next meeting
- a.
 - b.
 - c.
 - c.