

Rosen Coaching

“Why just survive when you can thrive...
Let me help you *attract* the practice of your dreams”

Directions for Using the Rosen Coaching Stat forms

If you use these forms the way they are meant to be used they should only take a few minutes per day and an extra few minutes at the end of the month.

1. **Monthly New Patient Retention Stats Sheet** - The intent of this form is to closely monitor where the holes in the bucket are. We are not looking for names here. We are only looking for numbers. i.e. How many new patients did we see today? How many ROF's etc. You will see three categories under “SIGNED UP FOR CARE.” Please put the types of plans you offer and how many people signed up under each plan i.e. we have ppv (pay per visit) or 2 (for two month plan) or 12 (for 12 month plan) Obviously we need you to customize this form to what you offer in your office! At the end of the month you can total up the numbers and you will transfer those numbers to the “Yearly New Patient Retention Stat Sheet.”
2. **Yearly New Patient Retention Stat Sheet** - At the end of each month just transfer the totals from the “Monthly New Patient Retention Stat Sheet” to this sheet and email or fax it to us. (Please don't forget to write the doctors name... not just the name of the office.)
3. **Daily, Weekly, and monthly STATISTICS** - This form is meant to keep daily statistics. You may want to keep other stats i.e. how many children, nutrient sales etc. If you do then please add those stat columns to the “Monthly Statistics for the Year” form. What I have on this form is the minimum of what I need. At the end of the month, total up the numbers you want to monitor and transfer them to the “Monthly Statistics for the Year sheet.”
4. **Monthly Statistics for the Year** - At the end of each month just transfer the totals from the “Daily, Weekly, and monthly STATISTICS” Stat Sheet to this sheet and email or fax it to us. (Please don't forget to write the doctors name... not just the name of the office.)

