

# Simplify Action Plan Matrix

Value Lever	Gap	Process Measure	Action Plan Name	Action Item Title	Action Item Description
Provider FTEs	Limited appointment availability is a barrier to seeing more patients.	Days worked per Provider	Increase days worked per provider	<ul style="list-style-type: none"> <li>•Add weekday shifts</li> <li>•PTO Mitigation</li> </ul>	<ul style="list-style-type: none"> <li>•Add additional days to schedule</li> <li>•Encourage a culture shift where providers add appointments or shifts when taking time off, which helps mitigate impact of blocks due to PTO</li> </ul>
Provider FTEs	Blocked appointments are a barrier to seeing more patients.	Blocked Appointment Rate	Increase appointment availability	<ul style="list-style-type: none"> <li>•Budget Crosscheck</li> <li>•Dashboard Insights</li> <li>•Block Control</li> </ul>	<ul style="list-style-type: none"> <li>•Implement a cadence for reviewing clinic and provider-level budgets and patient schedules. Regularly cross-reference budgets with patient schedules to ensure enough patients are seen to meet financial goals. This may uncover unnecessary schedule blocks.</li> <li>•Give providers visibility to the impact of blocked appointments on the practice's financial health via PowerBI dashboards, budgets and P&amp;L.</li> <li>•Only allow PMs to block appointment slots to prevent unnecessary or unauthorized blocking, ensuring that appointment slots are optimized towards business priorities.</li> </ul>
Provider FTEs	Limited appointment availability is a barrier to seeing more patients.	Provider Productivity	Improve usage of existing appointment slots	<ul style="list-style-type: none"> <li>•Schedule Accuracy</li> <li>•Call Center Scripts</li> <li>•Best Practices</li> <li>•Overbooking Strategy</li> </ul>	<ul style="list-style-type: none"> <li>•Send regular reminders to PSC's to keep the schedule up to date with provider availability, ensuring all available slots are accurate, visible and bookable.</li> <li>•Work with call center to improve verbiage for moving appointments up. This can help free up blocked slots for other patients, making the schedule more agile.</li> <li>•Share best practices from high-performing locations, and shadow PMs to set encounter benchmarks and improve operational efficiency (consider using "Peer Group" tab to identify these centers)</li> <li>•Double and triple book to accommodate cancels and no-shows. By slightly overbooking, the practice can ensure these blocked appointments with no-shows or cancels are still effectively utilized.</li> </ul>

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Provider FTEs	Limited appointment availability is a barrier to seeing more patients.	Available Appointment Slots	Increase appointment availability	<ul style="list-style-type: none"> <li>•Off-Hours Coverage</li> <li>•PTO Mitigation</li> <li>•Best Practices</li> </ul>	<ul style="list-style-type: none"> <li>•Target evenings and weekends to increase provider availability during less common hours</li> <li>•Encourage a culture shift where providers add appointments or shifts when taking time off, which helps mitigate impact of blocks due to PTO</li> <li>•Share best practices from high-performing locations, and shadow PMs to set encounter benchmarks and improve operational efficiency</li> </ul>
Provider FTEs	Provider count may be insufficient to meet market demand	Provider Headcount	Add additional providers	•Add an additional provider	<ul style="list-style-type: none"> <li>•Hire an additional provider</li> <li>•Spotlight new provider to increase volume</li> </ul>
Clinic EBITDA per Visit	Services are concentrated to base procedures which generate less revenue per Visit.	RVUs per Visit	Improve profitability	<ul style="list-style-type: none"> <li>•Leverage RVU Trend Data</li> <li>•Data-driven Upsell</li> <li>•Mohs Availability</li> <li>•Referral Programs (RVU)</li> </ul>	<ul style="list-style-type: none"> <li>•Monitor financial performance by using PowerBI dashboards to track RVUs, identify trends and adjust practices as needed.</li> <li>•Use evidence-based protocols to enhance the complexity of RVUs of each visit, increasing upsell opportunities. Use clinical decision support tools to identify additional medically necessary services that can be provided during a visit.</li> <li>•Adds days where Mohs is available for patient appointments.</li> <li>•Implement referral programs that encourage referrals for high RVU services to increase patient volume and awareness.</li> </ul>
Clinic EBITDA per Visit	Concentration of lower revenue patients/services is a barrier to growing RVU per visit.	Patient Revenue per RVU	Improve profitability	<ul style="list-style-type: none"> <li>•High Revenue Services</li> <li>•Marketing Service Availability</li> <li>•Marketing Provider Focus</li> <li>•Enhance Website Presence</li> <li>•Referral Programs (Cosmetics)</li> </ul>	<ul style="list-style-type: none"> <li>•Introduce high revenue services, expanding offerings of specialized procedures, diagnostics, and cosmetic services that command higher reimbursement rates.</li> <li>•Market the benefits and availability of higher revenue services to increase demand.</li> <li>•Market provider focus on aesthetics and other high-revenue services to increase patient uptake and demand.</li> <li>•Enhance the online presence of cosmetic services.</li> <li>•Implement referral programs that encourage referrals for high revenue services to increase patient volume and awareness.</li> </ul>

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Clinic EBITDA per Visit	Labor hours are not being effectively optimized for visits.	Visits per Labor Hour	Improve profitability	<ul style="list-style-type: none"> <li>•Optimize Patient Flow</li> <li>•Automate Admin Tasks</li> <li>•Labor Hour Trend Review Cadence</li> <li>•Check-in/out Bottlenecks</li> <li>•Staff Process Feedback</li> </ul>	<ul style="list-style-type: none"> <li>•Adapt schedules to daily and weekly patient flow variations.</li> <li>•Use technology to automate administrative tasks to free up staff for patient care.</li> <li>•Track labor hour utilization by regularly reviewing and adjusting staffing levels based on patient volume and needs.</li> <li>•Streamline check-in and check-out processes to reduce bottlenecks.</li> <li>•Solicit staff feedback to encourage suggestions for workflow and process improvements.</li> </ul>
Clinic EBITDA per Visit	Excessive overtime costs are reducing overall profitability per patient encounter.	Overtime Expense per Visit	Improve profitability	<ul style="list-style-type: none"> <li>•Bi-weekly OT Report Review</li> <li>•Labor Management</li> <li>•Surge Scheduling</li> <li>•OT Policy</li> </ul>	<ul style="list-style-type: none"> <li>•Regularly review monthly P&amp;L with PMs and share OT reports on a bi-weekly basis to manage financial performance.</li> <li>•Work with department leads on better labor management. Shift culture to prioritize scheduling according to business needs rather than team member preferences.</li> <li>•Implement flexible scheduling to accommodate high-demand periods without incurring overtime.</li> <li>•Implement strict overtime policies and approvals to control unnecessary overtime</li> </ul>
Clinic EBITDA per Visit	The billing and reimbursement process is not optimized.	Collections per RVU	Improve profitability	<ul style="list-style-type: none"> <li>•RVU Coding Audits</li> <li>•Continuous Staff Education</li> </ul>	<ul style="list-style-type: none"> <li>•Conduct periodic billing audits to ensure compliance and identify opportunities to capture additional revenue through proper coding.</li> <li>•Continuously educate providers and staff on accurate and optimal coding practices.</li> </ul>
Visits per Provider FTE	Patients are not returning often enough to materially impact visits.	Returning Patients	Increase Return Patients	<ul style="list-style-type: none"> <li>•Patient Follow-Up Reminders</li> <li>•Check-out Process</li> <li>•Patient Health Education</li> <li>•Inform Patients on Center Changes</li> </ul>	<ul style="list-style-type: none"> <li>•Enhance patient engagement by implementing a systematic follow-up communication process to encourage patients to schedule and attend regular visits, eg Send email and text reminders for patients that haven't been back within 12 and then 18 months.</li> <li>•Schedule patients at check-out for their follow-up appointments.</li> <li>•Educate patients on the importance of regular check-ups and follow-up appointment for their health.</li> <li>•Keep patients informed about relocations or staff changes via staff calling, emails and texts.</li> </ul>

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Visits per Provider FTE	Lack of referred patients is a barrier to visit growth.	Referrals per Referring Provider	Increase Referrals	<ul style="list-style-type: none"> <li>•Referral partner relationship management</li> <li>•Streamline referral system</li> <li>•Shared Patient Management</li> <li>•Share Success Stories</li> <li>•Thank Referring Providers</li> </ul>	<ul style="list-style-type: none"> <li>•Build and strengthen relationships with local medical offices to boost new patient referrals by maintaining regular contact through newsletters, emails and phone calls to keep them updated on services, availability, and practice updates.</li> <li>•Streamline the referral system to an ensure efficient and user-friendly process, make it easy for other providers to refer patients.</li> <li>•Develop integrated care programs that include shared patient management with referring providers.</li> <li>•Promote specialty services, new treatments offered and their outcomes by sharing case studies and success stories to referring providers.</li> <li>•Acknowledge and thank referring providers, reinforcing the value of their partnership.</li> </ul>
Visits per Provider FTE	Lack of non-referred patients is a barrier to visit growth.	Non-Referred Patients per FTE	Increase New Patients	<ul style="list-style-type: none"> <li>•Campaigns &amp; Outreach Programs</li> <li>•Community Engagement</li> <li>•Friends &amp; Family Referrals</li> <li>•Local Partnerships</li> <li>•Optimize Website</li> </ul>	<ul style="list-style-type: none"> <li>•Increase marketing to boost non-referred patient encounters: <ul style="list-style-type: none"> <li>-Digital marketing campaigns using social media, SEO, and targeted online ads</li> <li>-Targeted outreach programs like direct mail campaigns to specific demographics or areas</li> </ul> </li> <li>•Focus on community engagement/outreach by participating in community events and health fairs to increase visibility and attract non-referred patients.</li> <li>•Encourage existing patients to refer friends and family, increasing both new and returning visits.</li> <li>•Partner with local companies to provide wellness programs and attract their employees as patients.</li> <li>•Enhance online presence, ensuring the clinic's website is optimized for local searches, and provide easy to use online booking.</li> </ul>
Visits per Provider FTE	Lack of referred patients is a barrier to visit growth.	Referring Providers	Increase Referrals	<ul style="list-style-type: none"> <li>•Build referral network (Medical Offices)</li> <li>•Build referral network (Clinics)</li> </ul>	<ul style="list-style-type: none"> <li>•Build new relationships with local medical offices to boost new patient referrals.</li> <li>•Form strategic partnerships with hospitals, urgent care centers, and other clinics to create a referral network.</li> </ul>

Value Lever	Gap	Process Measure	Action Plan Name	Action Item Title	Action Item Description
Visits per Provider FTE	Patients are not returning often enough to materially impact visits.	Visits per Unique Patient	Increase Visits	<ul style="list-style-type: none"><li>•Check-out Process</li><li>•Patient Health Education</li><li>•Inform Patients on Center Changes</li><li>•Same-week appt</li><li>•Loyalty Programs</li><li>•Patient Outcomes</li><li>•Trend Analysis</li></ul>	<ul style="list-style-type: none"><li>•Schedule patients at check-out for their follow-up appointments.</li><li>•Educate patients on the importance of regular check-ups and follow-up appointment for their health.</li><li>•Keep patients informed about relocations or staff changes via staff calling, emails and texts.</li><li>•Notify of same-week appointment availability.</li><li>•Trial loyalty programs that incent regular visits with rewards.</li><li>•Track patient outcomes to highlight the benefit of regular visits.</li><li>•Analyze patient visit patterns to identify trends and gaps in patient visits, and develop targeted strategies to increase visit frequency.</li></ul>