

PT MONTHLY BUSINESS PLAN



NAME	DATE COMPLETED
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REVIEW FOR MONTHLY MEETING #1 (PT COMPLETES BEFORE MEETING)

LEVELING

LEVEL	CPT / EXP	S1 / EXP	S2 / EXP	S3 / EXP
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AVAILABILITY

[illegible]**TOTAL WEEKLY HOURS AVAILABLE**

PRIOR MONTH REVIEW

ACTIVE CLIENTS	GOAL		ACTUAL	
SESSIONS SERVICED	GOAL		ACTUAL	
RENEWALS	GOAL		ACTUAL	
COMP. PT SESSIONS	SET	SHOW		CLOSE

CLIENT AND CLIENT FILE REVIEW

[illegible]



NAME _____ DATE COMPLETED _____

PT / FM GOAL SETTING**RENEWAL GOAL**

CLIENTS UP FOR RENEWAL (6 OR LESS SESSIONS)

CLIENT RENEWAL GOAL

CLIENT NEED AND ACQUISITION**LONG TERM****THIS MONTH**

LONG TERM SESSION GOAL	MONTHLY INCOME GOAL / SESSION PAY	=	TOTAL SESSIONS NEEDED PER MONTH	SS TOTAL THIS MONTH
ADDITIONAL SESSION NEED	MONTHLY SESSION NEED - PREVIOUS MONTH SESSION TOTAL	=	MONTHLY SESSIONS TO BE ADDED	ADDED THIS MONTH
CPTS CLOSE GOAL	SESSIONS ADDED / CLIENT FREQUENCY	=	NEW CLIENT NEED / COMP PT SESSION CLOSE GOAL	NEW CLIENTS ADDED
CPTS SHOW GOAL	NEW CLIENT NEED / COMP PT SESSION CLOSING %	=	COMP PT SESSION SHOW GOAL	CPTS SHOW
CPTS SET GOAL	COMP PT SESSION SHOW GOAL / COMP PT SESSION SHOW %	=	COMP PT SESSION SET GOAL	CPTS CLOSE

ACTIVE CLIENTS

CURRENT

END OF MONTH

MID MONTH FOLLOW UP**SESSIONS SERVICED****MID-MONTH TARGET****ACTUAL****VARIANCE****NEW CLIENTS****MID-MONTH TARGET****ACTUAL****VARIANCE****CPTS****MID-MONTH TARGET****ACTUAL****VARIANCE**

S/S/C

S/S/C

S/S/C

RENEWALS**MID-MONTH TARGET****ACTUAL****VARIANCE****OTHER FOLLOW UP ITEMS****SESSION OBSERVATION FOLLOW-UP**