

# PT MONTHLY BUSINESS PLAN

**NAME** \_\_\_\_\_ **DATE COMPLETED** \_\_\_\_\_



## **REVIEW FOR MONTHLY MEETING #1 (PT COMPLETES BEFORE MEETING)**

# LEVELING

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

## PRIOR MONTH REVIEW

<b>ACTIVE CLIENTS</b>	<b>GOAL</b>	<b>ACTUAL</b>	
<b>SESSIONS SERVICED</b>	<b>GOAL</b>	<b>ACTUAL</b>	
<b>RENEWALS</b>	<b>GOAL</b>	<b>ACTUAL</b>	
<b>COMP. PT SESSIONS</b>	<b>SET</b>	<b>SHOW</b>	<b>CLOSE</b>

# **CLIENT AND CLIENT FILE REVIEW**



**NAME** \_\_\_\_\_ **DATE COMPLETED** \_\_\_\_\_

# PT / FM GOAL SETTING

## RENEWAL GOAL

CLIENTS UP FOR RENEWAL (6 OR LESS SESSIONS) **10** / 100

## CLIENT NEED AND AQUISITION

Long Term				This Month
Long Term Session Goal	Monthly Income Goal / Session Pay	=	Total Sessions Needed Per Month	\$ 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 Service**

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

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## **SESSION OBSERVATION FOLLOW-UP**