

Practitioner Performance & R.O.O.T.S. Growth Tracker

Mentee Name: _____ Supervisor: _____

Review Period: [] Month 1 [] Quarter 1 [] 6-Month (Summative) Date: _____

Section 1: Clinical & Relationship KPIs (Objective Data)

Track the practitioner's data against clinic benchmarks to identify growth areas.

KPI Category	Metric	Current Score	Goal
Clinical Outcome	Symptom Resolution Rate (>50% MSQ improvement)	___ %	75%
Lab Accuracy	Hypotheses vs. Actual Lab Results	___ %	80%
Retention	Re-engagement Rate (Target \$\rightarrow\$ Sustain)	___ %	70%
Relationship	Net Promoter Score (Client Empathy/Comm)	___ /10	9.0

Section 2: R.O.O.T.S. Competency Checklist

Use this for Formative Assessment (Ongoing Coaching) to identify clinical bottlenecks.

[R] REVEAL - [] Connects "The Story" to the clinical timeline effectively. - [] Demonstrates empathetic listening during intake (avoids interrupting).

[O] ORGANIZE - [] Correctly maps antecedents, triggers, and mediators on the Matrix. - [] Identifies "Red Flags" or clinical "Logic Trace" errors.

[O] OPTIMIZE - [] Prioritizes lifestyle foundations before moving to supplements. - [] Uses "Empowerment Education" to prevent client overwhelm.

[T] TARGET - [] Justifies supplement logic based on physiological mechanisms. - [] Demonstrates precision in functional lab interpretation (DUTCH, GI-MAP, etc.).

[S] SUSTAIN - [] Successfully transitions clients into long-term maintenance phases.

Section 3: Feedback Log (Radical Candor Model)

Note: Be direct with challenges while showing personal investment in their success.

Personal Care (Strengths observed):

Direct Challenge (Clinical gaps or "Logic Trace" corrections needed):

Section 4: Individual Development Plan (IDP)

Specific Action Item: (e.g., Shadow 5 DUTCH reviews, record 3 intakes)

Target Mastery Date: _____

Incentive/Outcome: (e.g., "Upon 70% retention, commission increases by 5%")

Supervisor Signature: _____ **Mentee Signature:** _____

AccrediPro Standards Institute Certified Tool — Module 25: Lesson 6
