

PEA 2.1 Format

100 Total Points

1 New Patient 30 POINTS

Metric

Based off the PEA Report does the clinics new patient count fall within the allotted threshold?

Behaviors

- Ad spend is reported and meets required minimum spend. Please include clinics quarterly spend in comments.
- Do the clinic's hours and staffing align with company policies and meet the patient flow demands?
- Is the clinic's digital lead conversion above 40% as a 3-month average? If not, ensure Carbon Incoming Call Notifier is being used.
- Is the clinic's "Referred by Patient or Staff" to at least 30% over the past 3 months from the Axis Marketing Breakdown report?
- Clinic responds to positive and/or neutral reviews on social media sites like Google, Yelp and Facebook.
- Clinic Microsite is fully optimized with photos in media gallery, current doctor bios and photo, patient testimonials, and directions to clinic location.

2 Conversion 21 POINTS

Metric

Based off the PEA Report does the clinics new patient count fall within the allotted threshold?

Behaviors

- Is the clinic staff aware of performance metrics goals? (Sales, Conversion %, New Patients #)
- Does the WC greet and provide an orientation during the intake process to build rapport and educate patients on key differentiators? (Hours of operation, walk in clinic, no insurance necessary, etc.)
- Does the DC utilize the Patient Activity Assessment (pg. 9 of intake forms) during the consultation, exam, and adjustment?
- Does the DC explain the treatment plan including the 3 Stages of Care scripts?
- Does the DC restate the treatment plan, importance of frequency & consistency of care to achieve the "wellness phase" of The 3 Stages of Care and the committed follow up visit while handing physical copy of the treatment plan to the WC?
- Does the WC follow the sales scripts during the plan presentation?

3 2nd Month Return Rate 14 POINTS

Metric

Based off the PEA Report does the clinics new patient count fall within the allotted threshold?

Behaviors

- Does the DC provide the patient a personalized explanation of the treatment plan, obtaining patient buy-in & follow up visit while in adjustment bay?
- Does the DC continue the discussion of wellness care beyond the initial visit with existing patients?
- Do the DCs complete 3-Day Thank You Calls?
- Does the WC complete actionable phone calls?
- Does the DC provide the patient with effective home care instructions?
- Does the staff effectively explain and promote digital care cards to help reinforce patient commitment to care the first 30 days? (Use of paper cards not approved)

4 Attrition 20 POINTS

Metric

Based off the PEA Report does the clinics new patient count fall within the allotted threshold?

Behaviors

- (Existing Patients) Does the staff greet all patients by name, re-engaging and building rapport?
- Does the WC celebrate and encourage usage by updating patients of their RPVs (remaining patient visits) during check in?
- Is the clinic following the patient flow process? (Directing patients to the adjustment bay after scanning in.)
- Does the DC provide a "talking adjustment" and discuss areas of focus for the next visit?
- Does the DC continue chiropractic education during every visit? Leverage tools such as Spinal Nerve Chart.
- Does the DC gain commitment for the existing patient's next visit?
- Does the WC avoid mentioning "2-month minimum?" at any point in the sale process?
- Is the WC following the Flex Plan Change Procedure correctly?

5 Brand Standards 15 POINTS

Brand Standards

- All WCs and DCs completed their respective Learning Paths & Axis Training in The Learning Center.
- Only approved and current marketing collateral, artwork, and signage is displayed and in good condition.
- All furniture, surfaces and fixtures operational, clean, and without damage.
- All staff in accordance with uniform policy.
- Correct hours of operation and DC names (if required by state law) professionally displayed on front door decal. For PC states, PC and Management company need to be displayed.

Seasonal Brand Focus

*Questions to be determined quarterly and are not scored.

Auto-Fail

6 Critical Violations (Not Scored)

Critical Violations

- Do only associates that are currently employed with The Joint appear on the clinics' Axis Clinic User List?
- Are the DC and clinic business licenses posted and current?
- Is the clinic PC compliant (if applicable)?
- Does the clinic follow all protocols to protect Patient Privacy?
- Does the clinic use, save, and correctly transcribe using the current and correct forms inclusive of: Intake Forms, Wellness Plan agreement, Package agreement, Flex plan agreement, cancellation and freeze request?
- Does the clinic follow correct Medicare compliance procedures?
- The clinics pricing, discounts, and promotions are consistent with current approved company standards?
- The clinic has no additional unapproved retail, services, or equipment displayed, mentioned, or in use?
- DC reviews and initials the informed consent page with (where applicable based on state law) and advise of possible risks associated with chiropractic care?