



Set Goals for Your Practice Worksheet

This is an extra resource to go along with the original article:

[What patients are looking for now in a healthcare practice](#)

Setting long- and short-term goals is key to running a thriving practice. But with so many places to start, it might be difficult to narrow down your list. Here are a few questions to help you identify your greatest priorities for the coming year.

1. Rate the following in terms of priority, #1-3.

- a. Patient Retention _____
- b. Patient Acquisition _____
- c. Patient Engagement _____

If you need to improve patient retention, take an honest look at your processes and care. If it's acquisition, you're after, look into developing a stronger online presence. If engagement is your goal, try out some new strategies for engaging your current patient base.

2. Where do you see your practice in 10 years?

- a. Multiple locations, strong brand
- b. Single location, strong patient base
- c. Online presence, with video visits

Are your current strategies and plan for scale aimed at this goal? If not, reframe your short-term goals to meet your long-term goal!

3. Over the next 6 months, what would you like to focus on?

- a. Developing a better online presence
- b. Improving administrative processes
- c. Engaging with patients more
- d. Streamlining staff

If you're interested in any (or all) of the above, you might want to give IntakeQ a try!