

Healthcare Business Planning Checklist

Planning For Your Success

Is your healthcare business positioned for success? This checklist can help you understand where your business is prepared to meet your goals, and where you may be at risk.

PEOPLE



- Is the right leadership, including you, in place to oversee key areas like HR, revenue cycle management, compliance, and technology?
- Do those team members have the necessary time, knowledge, and resources to manage these areas effectively?
- Are you or your staff feeling overwhelmed by managing extra responsibilities while providing care?
- Are you satisfied with your ability to legally and efficiently manage recruiting, hiring, onboarding, training, and terminating employees as staffing needs change?
- Do you have the resources to retain high-performing staff, including competitive benefits and ongoing development opportunities?
- If you're experiencing turnover, do you understand why employees leave and how to address it?

PROTECTION



- Do you or your leaders feel confident managing employee relations according to federal and state laws?
- Do you or your leaders feel confident in knowing the latest rules to comply with regulatory oversight from CMS ?
- Are your staff members fully trained on these requirements - and do you have a scalable program in place for ongoing training?
- If you were audited tomorrow, do you worry that your documentation and care practices might not be up to standards?
- Has it been a while since you've reviewed your insurance coverage, including those policies that cover your business as well as any employee plans?



Do you wonder whether your business has sufficient security in place across your network and technology platforms to prevent a data leak?

PRODUCTIVITY



Have you considered your business processes and wondered about automating and simplifying operations?

Is your current technology failing to meet your needs or assist you and your staff in tasks more efficiently?

Do you or your leaders feel that you lack the necessary reporting and insights to make data-driven business decisions?

Are you confident that your processes efficiently provide enough care and attention to patient families?

Have you considered needing additional resources or expertise to achieve your business goals?

PROFITABILITY



Do you find it challenging to focus on growing your business due to competing priorities or resource constraints?

Are you spending money on multiple partnerships or full-time staff that you can't afford or that do not contribute to your bottom line?

Are you satisfied with the effectiveness and efficiency of your business's revenue cycle management operations?

Have you experienced delays or errors in billing due to insufficient coverage, expertise, or time within your current staff?

Are you experiencing an increase in ADRs that is putting additional pressure on you or your staff to resolve?

Have you faced fines or are you worried about weathering costly HR or healthcare compliance penalties?

HOW DID IT GO?

If any of your answers aren't what you hoped they would be, we can help.