

Monthly Practice Checklist

Stay ahead of your clients and on top of your practice with this list. Color in the circles as you complete, each step, each month. Customize to suit your needs.

Action	J	F	M	A	M	J	J	A	S	O	N	D
1) Send birthday and holiday cards.												
2) Send progress reports.												
3) Identify 3 things YOU want for each client next month.												
4) Send/call with an acknowledgement for each client's growth.												
5) Collect all receivables.												
6) Prepare your monthly financial statement.												
7) Market until your practice is full.												
8) Schedule/enroll speaking engagements or workshops for clients.												
9) Buy more supplies or new equipment to do a great job.												
10) Send billing out.												
11) Pay your own bills - early.												
12) Make appropriate policy or pricing changes for the practice.												
13) Follow up with all leads and referrals.												
14) Ask for at least 5 referrals from current clients.												
15) Take plenty of time off.												
16) Update your Clean Sweep and other program scores.												
17)												
18)												
19)												
20)												
21)												
22)												
23)												
24)												

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