



Differential Diagnosis of Your Business:

Please provide as much of the following information as you have available in order for us to better understand your business. Use attachments or Steffes & Associates Tools to expedite reporting.

**Primary Needs/Objectives for Consultation:
Leadership/Organizational Strategies as follows:**

Growth Strategies & Service Line Development

Human Resource/Staffing Issues as follows:

Marketing as follows:

Expense or Financial Management Strategies as follows:

Operations/Policy & Procedures Resources as follows:

Compliance/Risk Management Strategies as follows:

Company Description:

Name
Company Description
Contact Information for Consultation
Location(s)
Mission/Vision
Brief History

Management/Organization:

- Ownership & Structure
- Organization chart
- Key Management Team/Titles/Brief Bios
- Current/Previous Consultants and Advisors

Services

- Service descriptions
- Staff Expertise/Experience/Certifications/ Specialties
- Competitive advantages

Human Resources

- Human Resources Policies & Procedures
- Employee Orientation
- Staff Development Plan
- Compensation and other employee agreements
- Current Staffing & Compensation/Incentive Plans
- Current Benefit Package/Company(s)
- History of Employee Longevity/Turn Over

Marketing and Competitor Analysis for both current & previous 2 years

- Market statistics- demographic information
- Target markets: (women's health, Medicare population, adolescent athletes, etc.)
- Competitor data
- Marketing/Sales Responsibilities
- Customer Surveys- Samples/Results
- Customer Service Initiatives
- Referral Reports
- Marketing and Sales Initiatives

- Marketing plan for future
- Marketing Budget(s)
- Marketing vehicles- Collaterals you currently use
- Co-Marketing Relationships with other businesses/entities
- Marketing Media
- Social Media
 - Website
 - Blog
 - Twitter
 - List serves
 - E-News

Operations plan

- Current Practice Management Software/System
- Current Technical support for software/hardware/web
- Current Billing process
- Billing policies & procedures
- Fee Schedule/Date of last update
- List of Current third-party payer contracts with fee schedules/anniversary dates
- Current cash-based products & services/pricing
- Current Productivity Expectations & Results
- Current Physical Plant Issues
 - Lease Expense/longevity
 - Capacity
 - Appearance
 - Location

Financial Information for current & previous 2 years

- Financial statements
- AR Reports
- Financial forecasts and projections and assumptions
- Practice Data Including:
 - Average # of visits/episode of care
 - Average # of units/visit
 - Average charge/visit vs. Average payment/visit
 - Average cost/visit
 - Top 10 diagnoses/diagnostic groups treated

Risk/Compliance: Please verify that you have the following

- OSHA Compliance Plan- Including MSDS, Hiring Policies, Exposure, Infection Control, Safety P&P
- OCR Compliance Plan
- HIPAA Compliance Plan
- Medicare Corporate Compliance Plan
- Billing & documentation internal audit system
- HITECH Compliance Plan
- Internal Controls
- HR Compliance Plan
- Line of Credit

Other Documentation/Information Client feels is pertinent:

Signature/Date of Form & Compilation of Reports Completion