TheraCRM.pro

FREE GUIDE

The Empty Chair Ledger

What an unanswered call and a no-show cost your practice each week, in your own numbers.

TheraCRM.pro, by Aday Interactive, Inc., Coral Gables, Florida

How to use this ledger

1. Take last week. Not a typical week, just the last full one.
2. Pull three things: your phone log, your inbox and web form replies, and your schedule.
3. Fill in the four lines below. Each one is a count times a dollar figure you already know.
4. It takes about 20 minutes. Do it again in 30 days and compare.

Two numbers you need first

V What one new patient is worth

What a new patient pays your practice in their first 90 days, on average. Use fees collected, not fees billed.

Your number: **V** = _____

R Your booking rate

Of the new people who reach a person at your practice, how many book? If 5 of 10 book, R is 0.5.

Your number: **R** = _____

Example numbers are made up and round, to show the math. They are not a benchmark. Your ledger will differ, and that is the point.

The four lines

Line 1. Calls nobody answered

Count the new callers last week whose call went unanswered and who never called back or booked. Your phone log or call report shows this.

Count × R × V

Example: 4 callers × 0.5 × $600 = **$1,200 a week**

Your line: _____ = **$** _____

Line 2. Replies that came too late

Count the web forms, texts and messages from new people that waited more than one hour for a first reply, and never booked.

S is your honest guess at how many of them a fast reply would have saved. Nobody can know this number, so pick one you believe. If you think 1 in 4, S is 0.25.

Count × S × V

Example: 6 inquiries × 0.25 × $600 = **$900 a week**

Your line: _____ = **$** _____

Line 3. First visits that did not happen

Count the new patients who booked a first visit last week and then did not show, or cancelled too late to fill the time.

V is already an average across all your new patients, including the ones who come once. So a lost first visit costs about one V.

Count × V

Example: 1 first visit × $600 = **$600 a week**

Your line: _____ = **$** _____

Line 4. Empty chairs from current patients

Count the visits last week where a current patient did not show or cancelled too late, and nobody else took the time.

F is your fee for one visit.

Count × F

Example: 3 visits × $150 = **$450 a week**

Your line: _____ = **$** _____

Your total

Add the four lines. That is what empty chairs cost you last week. Multiply by 50 working weeks for a year.

Line 1 _____ + 2 _____ + 3 _____ + 4 _____ = **$** _____ a week

× 50 weeks = **$** _____ a year

Example: $1,200 + $900 + $600 + $450 = **$3,150 a week**, or about **$157,500 a year** at 50 weeks.

The four fixes

One fix for each line. Each can be done by hand this week. The automated version is what a TheraCRM.pro seat is set up to run.

LINE 1

Missed-call text-back

When a call goes unanswered, a text goes back to the caller in seconds: sorry we missed you, reply here or pick a time at this link. In English and Spanish.

By hand: one person owns the missed-call list and calls every new number back within the hour, every day.

LINE 2

Instant first reply

Every web form, text and message gets a first reply, configured to send in under a minute, at any hour, in the language the person wrote in. Your staff take it from there.

By hand: set a saved reply for each channel and check the inbox at fixed times, first thing, midday and before you close.

LINE 3

Visit reminders

A reminder 24 hours and 1 hour before each first visit, with a link to confirm or move the time, so a cancelled time comes back early enough to fill.

By hand: call or text every first visit the day before, and ask them to confirm.

LINE 4

No-show recovery and the waitlist

A rebooking offer within the hour after a no-show. When a time opens, the people on your waitlist hear about it in order.

By hand: keep a short list of patients who want an earlier time, and call down it when someone cancels.

What these messages may say

1. Logistics only: the time, the place, a link, the practice name. Never a service, a diagnosis or a treatment. A text can be read by anyone who picks up the phone.
2. Scheduled messages go out only between 8 AM and 8 PM Florida time. The instant reply to someone who just wrote to you is the one exception.
3. STOP, ALTO, PARE, or plainly asking to stop, ends every message to that person.
4. Texts after that first reply need the person's consent, asked for with its own unchecked box on your form. Ask your counsel how the federal and Florida texting rules apply to you.

A note on HIPAA

HIPAA's test turns on electronic standard transactions, such as billing a health plan electronically, including through your EHR or a billing service. Whether that makes your practice a covered entity is a question for your counsel. For a covered entity, the HIPAA-enabled configuration and BAA is a $100 a month add-on on the Practice and Group plans. It needs guided setup, and the first HIPAA seat has a 3-month minimum. With the add-on, Aday Interactive, Inc. signs a BAA with your practice before first login. It is not part of the Solo plan. We will not decide your status for you; ask your compliance counsel. We are not attorneys and this is not legal advice.

If you want the fixes running for you

A TheraCRM.pro seat runs all four, in English and Spanish, set up before you log in. Solo is $349 a month, Practice $649, Group $1,149. Setup is one time: $300 on Solo, $1,000 on Practice, $1,500 on Group. No contract, except the 3-month minimum on the first HIPAA seat. See theracrm.pro/pricing.

Run the ledger again in 30 days. If the total went down, keep doing what you did. If it did not, the line that stayed high is where to look.

TheraCRM.pro is built and supported by Aday Interactive, Inc., 338 Minorca Avenue, Suite 202, Coral Gables, FL 33134. (305) 209-8453. theracrm.pro