Free Checklist: 12 Leading Indicators for Multi-Site Operators

Review these numbers every week. Each one predicts a cost or revenue problem weeks before it reaches the P&L.

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1. Give Each Line One Owner

One person watches the number and acts on it without waiting to be told.

2. Define Success

Write the target for each line, plus the level that means Watch and the level that means Act. See page 2.

3. Review Weekly

Go through the scorecard first, then work the issues it raises. Score your week on page 2.

#	LEADING INDICATOR	WHAT IT PREDICTS	TARGET	OWNER	THIS WK	LAST WK	STATUS
1	**Open shifts, next 14 days**	Overtime, agency spend, missed visits					OK · Watch · Act
2	**Call answer rate**	New patient volume next month					OK · Watch · Act
3	**Lead to appointment conversion**	How full the schedule will be					OK · Watch · Act
4	**Missed appointment and no show rate**	Lost revenue and idle provider time					OK · Watch · Act
5	**Authorization and intake backlog**	Delayed starts and lost care hours					OK · Watch · Act
6	**Days from visit to claim**	When cash will actually arrive					OK · Watch · Act
7	**Denial and rework trend**	Collections and AR aging					OK · Watch · Act
8	**New hire 90-day retention**	Turnover cost and coverage gaps					OK · Watch · Act
9	**Clinician utilization**	Margin per site					OK · Watch · Act
10	**Escalations per site, and who resolved them**	Leadership capacity at the site level					OK · Watch · Act
11	**Overdue licenses, credentials, and trainings**	Survey findings and payer risk					OK · Watch · Act
12	**Complaints and incidents open more than 7 days**	Reputation and compliance risk					OK · Watch · Act

Score your week on page 2. More than 4 lines on Act, or more than 4 on Watch for 3 months, means it is time for a call.

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Define Success, Score Your Week, and Check Team Ownership

Continuous improvement works when every number has a clear target and an owner. **bradleysinclairjr.com**

Step 1. Define What Success Looks Like

Before you track a number, agree on three levels: the target, the level that calls for a closer look (Watch), and the level that calls for action (Act).

EXAMPLE INDICATOR	SUCCESS LOOKS LIKE	WATCH	ACT	THIS WK	STATUS
Call answer rate	90%+ of calls answered live	85% - 89%	Below 85%	92%	OK
Open shifts, next 14 days	3% or fewer shifts still open	4% - 6%	Above 6%	5%	Watch
Days from visit to claim	Claims sent within 3 days	4 - 6 days	7 days or more	9 days	Act

Step 2. Score Your Week

Count your 12 lines by status each week. Example week: 7 OK, 3 Watch, 2 Act.

OK: ____
Target met

Watch: ____
Closer look needed

Act: ____
Action needed now

Weeks on Watch: ____
Same lines, in a row

More than 4 lines on Act?
Several parts of the operation are slipping at once. Book a call.

More than 4 lines on Watch for 3 months?
The same problems are not getting fixed. Book a call.

Step 3. Check Team Ownership

Numbers improve when a self-reliant team owns them. Answer yes or no.

Can every manager name the company's top 3 goals without looking them up?	Yes / No
Can front-line staff explain how their daily work moves one of those goals?	Yes / No
Does each indicator have an owner who acts without waiting for an executive?	Yes / No
Are most problems solved at the site level before they escalate?	Yes / No
Did the team make at least one process improvement this month?	Yes / No

Write your company's top 3 goals. Then ask three team members to name them.

1. _____ 2. _____ 3. _____

Is Your Score Telling You It Is Time?

Book a free 30-minute call. We review your scorecard and your top 3 goals together, and you leave with a short list of what to fix first, whether or not we work together.

Pick a Time on My Calendar

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