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### **Managing Partner's Ten-Point Monthly Task Checklist**

The first emotion of every doctor who has ever been nominated by his or her peers to the post of medical director or managing partner is pride. The second is panic, once you see how much the job entails when done right. Here's a generic checklist for the typical setting:

1. Two or more formal meetings with the practice administrator and review of the monthly financial reports, action list, graphs and forecasts.
2. A quick re-reading of the practice's strategic plan and asking yourself: "Are we still sticking to the plan, or is it time to revise?"
3. Attendance and participation at the regular senior managers meetings.
4. Prepare for and conduct the monthly doctor's meeting.
5. Review of and action regarding any open provider discipline or quality assurance matters.
6. Minimum of two hours per month (in aggregate...just a few minutes a day) spent walking the halls, visiting informally with support staff, asking questions and praising performance.
7. A mental scan of all external relationships (hospitals, referral sources, competitors, payers, vendors, etc.)...follow-up written, phone or face-to-face action PRN
8. A lunch, breakfast or similar meeting with one practice department head per month and with one of the practice's doctors (a separate or combined meeting as desired).
9. Reading/scanning of one general management book (pick up several titles during one bookstore visit and get through them in the intervening months) and reading/scanning of a business weekly or monthly such as Business Week, Inc. or The Economist (subscribe to one or more). Photocopy and distribute relevant articles to the management staff.
10. Monthly exercise...ask yourself..."What have I done this month to understand and improve my weakest management skill, be it gathering information, making decisions or taking action?"