

NPA Attendees Extra Minutes

Thank you for attending the Mile High Tide presentation. We are passionate about helping PACE organizations succeed. Our playbook has loads of plays to help them do just that.

During our NPA presentation, we could only share a few of our plays. In the spirit of Ted Lasso, we wanted to use the Extra Minutes to give you a few more.

These are just starting points. Please reach out to us with any questions or for more information.

Incentive Plan Example

Every healthy organization incentivizes its engagement teams – outreach and intake. This is an example of a hypothetical incentive plan. Keep in mind that individual plans are based on a company's KPI history and enrollment goals. Incentives can be individual contributors and/or department incentive programs.

Monthly Department Incentive Based on Total Enrollments		
Gross Enrollments	Per team member	Dept. Total
15 - 19 enrollments	\$100	\$1,000
20 - 24 enrollments	\$150	\$1,500
25 - 29 enrollments	\$200	\$2,000
30 + enrollments	\$300	\$3,000

** Based on 30 member department*

Outreach Incentive Based on SQL (Sales Qualified Leads that Enroll)			
	Enrollments	Incentive Payout	Incentive per SQL Enrolled
No Incentive	0-4	\$0	\$0
Milestone	5	\$200	\$200
	6	\$25	\$25
	7	\$25	\$250
	8	\$25	\$275
Milestone	9	\$200	\$475
	10	\$50	\$525
	11	\$50	\$575
	12	\$50	\$625
Milestone	13	\$200	\$825
	14	\$75	\$900
	15	\$75	\$975
	16	\$75	\$1,050
Milestone	17	\$200	\$1,250

Key Performance Trackers

Key Performance Indicators need to track historical data (lagging) and predict the future probability of success (leading). Make sure to follow both. KPIs are also excellent tools for team meetings and one-to-one conversations with team members.

Individual KPIs							
August	Outreach Contacts Appointments	Presentations	Self Qualified Leads	Total Leads	Tours	Home Visits	Enrollments
This Month	32	2	13	28	5	8	4
Last Month	56	4	22	54	8	16	10
Year Total	380	25	152	254	32	120	87
Monthly Goal	50	4	20	40	10	15	8
Variance/Month	64%	50%	65%	70%	50%	53%	50%
Team KPIs (team of 5)							
August	Outreach Contacts Appointments	Presentations	Self Qualified Leads	Total Leads	Tours	Home Visits	Enrollments
Monthly Total	187	9	42	122	28	32	8
Last Month	246	16	92	191	46	79	44
Year Total	1653	92	627	1203	325	502	328
Monthly Goal	250	20	100	200	50	75	40
Variance/Month	75%	45%	42%	61%	56%	43%	20%

ADL and iADL Memory Tricks

ADLs

1. Eating
2. Walking
3. Toileting
4. Transferring
5. Bathing
6. Dressing

An ADL Story

Picture this: After eating dinner, you walk to the toilet. Finished, you transfer to the bath, then get dressed for bed after you're done.

iADLs

1. Managing Finances
2. Managing Transportation
3. Shopping and Meal Preparation
4. House Cleaning and Home Maintenance
5. Managing Communication
6. Managing Medications

An iADL Story

Picture this: You're managing your finances so you can pay for transportation for shopping to cook a meal for tonight. You clean the house after dinner, waiting for your family to call, remembering to take your medicine before bed.

Daily and Weekly Routines for Success

Daily Routine

1. Beginning of the day
 - a. Say hello to each team member every day to build rapport
 - b. Check the calendar and confirm appointments for today and tomorrow
 - c. Check funnel
 - d. Check emails and voicemails
 - e. Plan the day
2. End of the day
 - a. Review the day – what went well, what to improve?
 - b. Did you get a Sales Qualified Lead (SQL) today?

Weekly Routine

1. Field days
 - a. Appointments
 - b. Network visits
 - c. Territory work
 - d. Be in the field
2. Office days
 - a. Lead work
 - b. Tours
 - c. Set up field days
 - d. Administrative work