

	STRATEGIC	FINANCIAL	OPERATIONS & MARKETING	ALIGNMENT
January		Quarterly Financial Review	Ongoing Cadence including:	Tax CPA & CFP Planning
February		Finalize Budget & Communicate Goals (Current Year)		Team Evaluations, Compensation & Bonus Plan Conversations
March				
April		Quarterly Financial Review		
May	Brand Position Review (GWT doing Market Analysis w/ YTD results in July)		<u>Daily:</u> Morning Huddle, End of Day Close	
June			<u>Monthly:</u> Cash Flow Monitor Review	Informal team goal check in
July	Long Term Strategic Planning	Quarterly Financial Review	Growth Scorecard Review	
August		Mid-Year Forecast Update (Current Year)	Marketing Metrics Review	Tax CPA & CFP Planning
September	Announce PPO Changes		Office Performance Meeting	Formal Check Ins with Team on Goal Progress Evaluate Inflation with Wages and Patient Fees
October		Quarterly Financial Review	<u>Quarterly:</u> Strategic Marketing Review	Schedule All Advisor Meetings for Next Year (QFR, Tax, then CFP)
November		Build Production Forecast & Expense Review (For Next Year)		
December				Tax CPA & CFP Planning

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