

# Manage Expectations

Loyalty is earned! Earning that loyalty is important both with families and employees.

## Family Loyalty

Delivering great service to your clients is important, and so is fostering and protecting the strong, positive relationship you have with the kiddo's parents. One of the things that upsets great relationships is unexpected, unpleasant surprises. No one likes these!

To help you avoid those surprises, use this checklist to put a firm foundation under your family relationships. Each of these tools will help you manage expectations and strengthen loyalty. How many of these do you have in place? Consider creating those that are missing..

- Parent Guide to understanding insurance and their responsibilities
- Comprehensive new patient intake packet
- Parent Financial Responsibility form
- Credit Card on file form
- Office hours and appointment cancellation terms

## Employee Loyalty

No one enjoys an employer who “springs something” unexpectedly. To help you **not** be that employer, we strongly encourage every therapy practice to create, share and use an employee handbook. Here are some of the most important things to include:

- We're glad you're part of this practice
- Our vision, mission and values
- Workplace policies
- Code of Conduct
- Benefits and perks
- Working hours, PTO and vacation
- Employee resignation and termination
- The legal stuff...
  - Equal employment opportunity
  - State and federal employment laws with links to state, federal sites, Department of Labor, EEOC, others.
- At will employment

***Beeline clients have access to each of these forms and templates.  
There are perks to being part of The Hive!***