

End of Day Process

Putting Yourself in a Winning Position



AUDIBEL

CLINIC TEAM CHECKLIST

Today's appointments scheduled future appointments. If not, schedule callback in Sycle.

All orders submitted.

Appointments closed in Sycle.

Welcome calls completed and VOB tickets submitted.

Payments deposited.

Tomorrow's appointments confirmed (by 10:00am).

Tomorrow's open time slots filled.

Tomorrow's VOB's completed by Cognizant and loaded in e-docs.

Tomorrow's charts prepped.

Tomorrow's accessories and aids for fitting are charged.

Tomorrow's Morning Huddle Form and Service Fee Sheets prepped.

24-Hour post fitting phone calls completed.

TNS follow-up phone calls completed.

PAG's Completed.

SOAP Notes completed.

Check-in inventory items and prepare for delivery.

Office cleaned and prepped for tomorrow.

Today's Revenue Goal: \$ _____

Total Sales: \$ _____