

Healthcare growth planning

A checklist for your next team conversation

Start with the service you want to grow. Use organization-level information, and leave out patient names, records, and other sensitive health information.

01 Define the goal

- ☐ Name the service, location, or clinician group you want to grow.
- ☐ Choose a measure and record its starting point and time period. Distinguish inquiries, scheduled visits, completed visits, and clinician applicants.

02 Check capacity

- ☐ Confirm which clinicians and appointment types can take additional demand.
- ☐ Identify staffing or service-readiness dependencies, plus who owns scheduling and follow-up.

03 Follow the handoffs

- ☐ Walk through the path from a first inquiry or referral to the next step.
- ☐ Check who responds, where progress is recorded, and which handoffs stall.

04 Confirm requirements

- ☐ Ask the responsible lead or advisor to confirm payer, credentialing, clinical, or regulatory requirements relevant to the plan.
- ☐ Record the approvals needed before changing a service, message, or workflow.

05 Choose one next step

- ☐ Pick one bottleneck. Define the change, its owner, and the resources needed.
- ☐ Agree on a measure and review date before adding more activity.

One priority to take forward

Priority / next step

Owner

Review date