

The Initial Consult Audit™

Use this audit checklist to improve your initial consult system and that of your staff so that you get booked solid and maximise your results.

Stage 1: THE INTRO	Auditors Comments
(Own the room) The first 3 minutes	
(Compliance) Following the script strictly.	
(Setting the frame) Outlining what will happen to pre-frame. The re-booking before it starts.	

Stage 2: THE CLOSE	Auditors Comments
Specific diagnosis is given.	
Treatment techniques are detailed	
Duration of treatment detailed	
Frequency of treatment detailed	

Prognosis Given	
Objectives Handled	
Treatment Plan accepted by patient	

Stage 3: THE TRANSITION	Auditors Comments
The practitioner walks the patient out.	
Verbal handover to FOS by treating practitioner	
Practitioner provides written summary to FOS	
FOS repeats the recommendation to patient	
FOS block books the entire recommendations	
Whole process recommended by FOS using the new patient retention tracker	