COO Work Week

DAILY TASKS

- **8:00**
  - Ensure all telephone lines are tested.
  - Check the Intake Summary Report and Daily News Feed from yesterday.

- **8:15**
  - Intake Huddle
    - Review Intake Summary for the last 30 days for today's goals:
      - Chasing Calls
      - No Contacts
      - Cases signed but not entered yet

- **8:30**
  - Review the report of 24-hour calls not completed.
    - Send an email to Managing Attorney to ensure calls are made.

- **8:45**
  - Check emails and respond to urgent messages.

- **9:00**
  - Review HR items (recruiting, hiring, PIP plans, HI or payroll issues).

- **10:00**
  - Review weekly items (see below), based on day of the week.

- **1:00**
  - Check emails, voicemails, and daily newsfeed.

- **3:00**
  - Clean up for today and prepare for tomorrow. This includes mail, requests from owners or team members, etc.

WEEKLY

- **Monday – Move the Needle Day**
  - **10:00**
    - Team Huddle
  - **10:30**
    - Demands to do with no outstanding records.
      - Meet with each case manager and discuss what they need to get the demands out the door.
      - Speak with the case managers about their client contact goal for the week.
      - Make a list of systemic problems preventing the demands from going out.
  - **11:30**
    - Review the fees outstanding.
      - Meet with the attorney or case manager to see what needs to be done to ensure fees are deposited for the week.
      - Make a list of system problems preventing the fees from depositing
  - **12:00**
    - LUNCH – You must take care of yourself to care for everyone else!
  - **1:00**
    - Review emails, voicemails, daily newsfeed, etc.
  - **2:00**
    - Medical Records
      - Review outstanding records request to see which providers are giving issues.
      - Work with your medical records team (company) to correct the issue.

- **Tuesday – Tweak the Issues**
  - **10:00**
    - Work on items discovered yesterday during your meetings with your case managers and attorneys.
      - Problem solve (don't do the work - find the problem - create a solution)
      - Create process change form.
      - Create at least two process documents or update old.
  - **1:00**
    - Review emails, voicemails, daily newsfeed, etc.
  - **2:00**
    - Prepare for attorney meetings (Killing the Bs, Case Value, A Case Meeting)
      - Pull memo from the previous meeting and update the status of your to-dos.
      - Provide the managing attorney with the agenda of cases and follow-ups needed.

WEEKLY (CONTINUED)

- **Wednesday – Working for the Future!**
  - **10:00**
    - Marketing, Marketing, Marketing
      - What's working, What's not Working.
      - Marketing Calendar for the next week
      - Next month's DUE items: review, plan, and execute.
  - **1:00**
    - HR: Recruit - Recruit - Recruit
      - Work on all things HR, including team morale-building issues.
  - **2:00**
    - Work on action items from the previous week.

- **Thursday – Train the Team**
  - **10:00**
    - Intake, Intake, Intake
      - Pull 4 intake calls and listen to them with the team member who took the call.
      - Discuss opportunities and wins!
  - **11:30**
    - Learning Time
      - Provide a speaker or review processes updated this week.
  - **1:00**
    - Review emails, voicemails, daily newsfeed, etc.
  - **2:00**
    - Meeting Time (Partners & Consultants)
      - Create your action item list for the following week.
  - **3:30**
    - Review of Dashboard for Key KPIs
      - Demands, Medical Records, Client contact, Fees Deposited, Google Reviews, Leads Received, # of Bs over 90 days, etc.

- **Friday – Friday Check Up**
  - **10:00**
    - Project Day!