GoLean Healthcare

Win Back Your Week

5 Free Tools to Simplify Your Clinic Workflow

A practical guide for doctors and practice owners. Each tool takes 10 to 30 minutes and needs no new software.

> **REAL Partnership**
> Start with Tool 1. It gives you the one number that makes everything else click.

Why we made this guide

You trained for years to care for patients. Yet many doctors and practice owners we speak with spend a large part of each week on calls, referrals, paperwork and scheduling. That work matters, but it doesn't need your license.

This guide brings together five simple tools from our work with private practices. Together they show where your time goes, where patients slip through, and what you can hand off.

How to use this guide

Tool	Time	What you'll find out
1. Clinic Time Audit	15 min	How many of your weekly hours don't need your license
2. Delegation Map	10 min	Which tasks to keep, streamline or hand off
3. Front Desk Leak Checklist	10 min	Where patients and revenue quietly slip away
4. Missed-Call Recovery Playbook	20 min	What missed calls cost you, and a routine to fix it
5. New Patient Intake SOP Template	30–60 min	A written, repeatable intake process for your team

TOOL 1 · 15 MINUTES

The 15-Minute Clinic Time Audit

How many hours did your license spend on paperwork last week? This audit gives you one number: your Delegable Hours.

Step 1. Estimate last week's hours for each task

Rough numbers are fine.

Task	Hours last week	Needs my license? (Y/N)
Returning patient calls and voicemails		
Prior authorizations and insurance follow-up		
Referral coordination (sending and chasing)		
Charting cleanup and EMR data entry		
Scheduling, rescheduling and no-show follow-up		
Inbox and patient portal messages		
Staff questions and "quick" interruptions		
Other:		

Step 2. Do the math

1. Add up every row marked **N**. Your **Delegable Hours** per week: _____
2. Multiply by 4 for your monthly total: _____
3. Ask yourself: what would I do with that time? See more patients, add a service, or get home for dinner?

Step 3. Pick one quick win

Circle the biggest **N** row. That's the first task to hand off. Tool 2 will help you decide who takes it.

TOOL 2 · 10 MINUTES

The Doctor's Delegation Map

You didn't go to medical school to chase fax confirmations. In about 10 minutes, this map shows which tasks only you should do.

List your recurring tasks. Then sort each one with two questions: **Does it need my license or clinical judgment?** and **Does it need to happen in person?**

	In person	Can be done remotely
Needs my license	**KEEP** Exams, procedures, diagnoses, treatment decisions. This is where your time belongs.	**KEEP, BUT STREAMLINE** Reviewing results, signing care plans. Have someone prep and queue these.
Doesn't need my license	**DELEGATE LOCALLY** Rooming patients, vitals, check-in.	**DELEGATE REMOTELY** Scheduling, voicemail, referral follow-up, prior auths, recall lists, insurance verification.

Reflect

Count the tasks in the "Delegate remotely" box. It's usually the biggest and the easiest to hand off. Then ask: who on my team does these today, and what are they *not* doing because of it?

TOOL 3 · 10 MINUTES

The Front Desk Leak Checklist

Is your front desk leaking patients? Most leaks are quiet: a voicemail returned the next day, a referral nobody chased, a recall list that never got called. Tick each statement that's true for your clinic today. You can also hand this to your office manager.

Phones and first contact

- ☐ Every new-patient call is answered or returned within 2 business hours
- ☐ We know how many calls went to voicemail last week
- ☐ After-hours inquiries get a response first thing the next morning

Referrals and intake

- ☐ Every incoming referral is logged and contacted within 24 hours
- ☐ We track how many inquiries become booked patients
- ☐ Intake forms and insurance are verified before the patient arrives

Scheduling and follow-up

- ☐ No-shows get a reschedule call the same day
- ☐ We call our recall list of overdue patients at least monthly
- ☐ Open slots in the next 48 hours are actively filled

Visibility

- ☐ I can see who owns each task without asking around

Your score

Boxes ticked	What it means
9–10	Tight ship. Focus on growth, not leaks.
6–8	A few leaks. Fixing one or two can noticeably lift bookings.
0–5	Your team is likely stretched thin. That's a capacity problem, not a people problem.

TOOL 4 · 20 MINUTES

The Missed-Call Recovery Playbook

Every missed call is a patient deciding whether to call the next clinic.

First, put a number on it. Then fix the follow-up in a week.

Part 1. The missed-call math

Question	Your number
A. Missed or voicemail calls per week	
B. Share that are new-patient inquiries (estimate)	%
C. Share of new-patient inquiries you normally book	%
D. Average value of a new patient in their first year	$
Weekly revenue at risk (A × B × C × D)	$
Yearly revenue at risk (weekly × 50)	$

Part 2. The 5-step recovery routine

1. **Check voicemail on a schedule.** For example: 9am, 12pm, 3pm and end of day.
2. **Return new-patient calls first.** Existing patients can usually wait an hour. New patients often won't.
3. **Use a simple script.** *"Hi, this is [Name] from [Clinic], returning your call. I'd love to help you get scheduled. Do you have a minute now?"*
4. **Try twice, then text.** Two call attempts the same day, then a short text with no clinical details.
5. **Log every outcome.** Booked, left message, or not interested. One shared sheet gives you visibility you may not have today.

The honest bottleneck

Most clinics already know this routine. The hard part is having someone with the hours to run it every day, between check-ins and patient questions. If that sounds familiar, the fix is **capacity, not more willpower.**

TOOL 5 · 30–60 MINUTES

The New Patient Intake SOP Template

If your best front desk person called in sick tomorrow, would intake still work? This template turns the process in one person's head into steps your whole team can follow. Suggested targets are filled in; adjust them to fit your clinic.

Stage	Owner	Target time	Tools / EMR screen	What "done" looks like
1. Inquiry received (call, web form, referral)		Same day		Logged in tracker
2. First response		Within 2 business hours		Patient reached, or 2 attempts logged
3. Insurance and eligibility check		Within 24 hours		Coverage confirmed and noted
4. Appointment booked				Confirmation sent
5. Intake forms sent and returned		48 hours before visit		Forms complete in EMR
6. Reminder sent		24 hours before visit		Patient confirmed
7. Post-visit follow-up				Next visit booked or care plan sent

Also add

- A short call script for each stage
- Answers to the 5 questions patients ask most
- An escalation rule: when to bring in the doctor or manager

Tip: Writing SOPs takes real time and often slips behind daily work. Block one hour, finish stages 1–3 first, and build from there.

Want a second set of eyes on your results?

If you've filled in even one of these tools, you already know more about your clinic's workflow than most practices ever measure. The next step is deciding what to do about it.

We'd be glad to look at your numbers with you. In a **free, 20-minute Discovery Call**, we'll:

- Review your Time Audit, Delegation Map or Leak Checklist together
- Pinpoint the one bottleneck costing you the most time or patients
- Share what has worked for practices like yours

No pitch, no pressure. You'll leave with a clearer plan, whether or not we work together.

FROM A CLINIC WE PARTNERED WITH

50% → 70%

lead-to-patient conversion in three months, after building clear intake SOPs and tightening follow-up.

Book your free Discovery Call →

golean.health/discovery-call

Bring your filled-in worksheets, or just bring your questions.

GoLean Healthcare · REAL Partnership

We help doctors and private practices take non-clinical work off their plate with dedicated, HIPAA-trained Virtual Medical Assistants, so you can focus on patients and growth.