

# 10Xing Revenue With The CPR Business Efficiency Framework™

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## Meet Cheri

Cheri Ong is not your average plastic surgeon. After a life-changing triathlon accident gave her the opportunity to hit pause and reflect on her purpose in life, she developed the idea for the **Ong Institute of Plastic Surgery and Health**.

Her mission is to use plastic surgery to optimize health; helping her patients be healthier, feel better, and look better. With concierge level service and Cheri's expert knowledge and skills, the Ong Institute has set themselves apart from their competitors by providing an experience unlike any other.

But behind the scenes, Cheri knew they could be doing better. Her and her team were getting frustrated by the

amount of time they were wasting on low-level tasks and it was becoming more and more difficult to get things done in the business. The Ong Institute had massive potential, but it was being held back by inefficiencies—they didn't have the proper foundation in place to scale the business.

**That's where the Leverage Team comes in...**

**Leverage**





## Cheri's Goals

Cheri wanted to improve the way her team worked behind the scenes. She knew they could be more efficient by removing low-level tasks, unnecessary meetings, and cutting out distractions.

She also wanted to develop a more comprehensive system for managing projects in the business. When Cheri came to us, she had long term goals for her business but no clear way to achieve them. She also needed to keep better track of her clients and their progress as they worked through the various programs at The Ong Institute.

And finally, she wanted to get set up for remote work. While she obviously needed to be in the operating room, there were many other aspects of the business that could be done remotely. Getting set up for remote work would give her employees more freedom, make her life easier, and allow her to hire top tier talent in other areas. Seeing as much of her business ran on physical paper, this was no small task—but not impossible.

## Our Plan

We took an initial look at Cheri's business and found that she was struggling with some of the most common problems that nearly all businesses face. Her team is talented and great at what they do, but they were getting bogged down in menial tasks and they didn't have an organized system for communicating or working on projects.

They also had information scattered in many different areas, leading to what we call the "information scavenger hunt." Simple tasks were taking ten times longer to complete than they should have because team members were forced to look in a dozen different places to find the information they needed.

All of these problems could be solved by implementing some new tools and embracing our **CPR Business Efficiency Framework™**.

**Phase 1:** Conduct an audit of Cheri's tech stack to see how she and her team are currently using technology. Assess whether there are any tools that should be removed, optimized, or added.

**Phase 2:** Set up a communication system so Cheri's team can communicate more effectively, even while remote. Implement Slack and get to Inbox Zero.

**Phase 3:** Set up a project management system with Asana, so Cheri's team can delegate and manage tasks, as well as track the progress of their clients in a visual, organized way.

**Phase 4:** Set up a resource and knowledge base with Notion, allowing Cheri and her team to digitize many of the paper documents they work with on a daily basis.

**Phase 5:** Optimize, automate, and document as many of Cheri's processes as possible.

**Phase 6:** Provide continued education around how Cheri's team should be using each tool and how they can be used to scale the business.

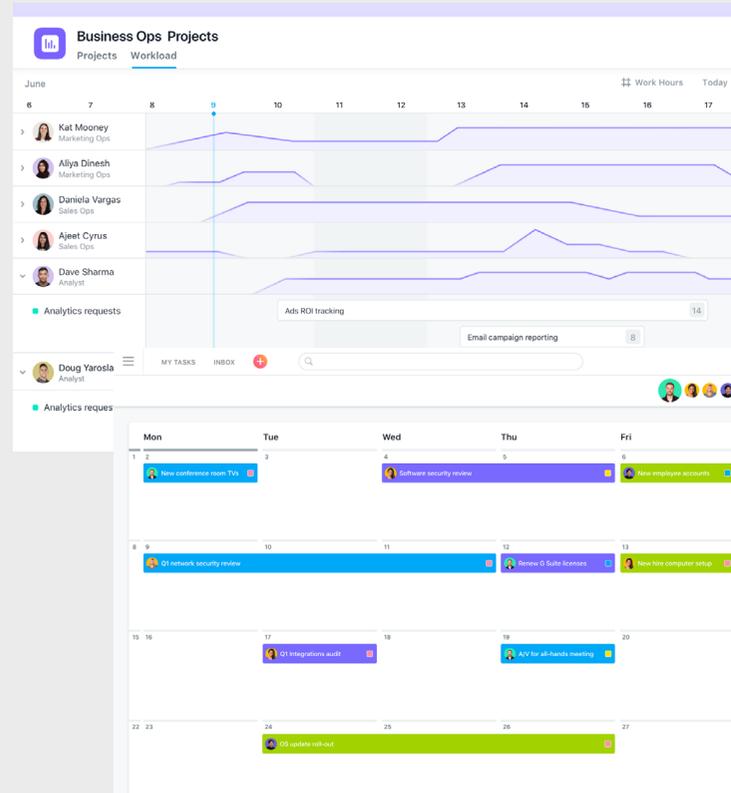
## The Results

After working with Leverage, Cheri was able to **digitize her entire practice and empower her team to work remotely**. She created a “virtual front desk” and one of her key team members now works remotely out of an Airstream RV. She was able to hire an executive assistant in a different state, and is now able to hire and train new employees without in-person contact.

Cheri and her team were also able to automate many of the low-level tasks in their business, freeing up their time and giving them more freedom of mind, as they no longer have to remember to do every little task.

With their new project management system, Cheri and her team can quickly and easily delegate tasks to each other, collaborate on tasks, and ensure that nothing falls through the cracks. Better yet, they’re now able to break their long-term goals down into smaller projects and track their progress over time. And on the client side, they’re using Asana to track the progress of their clients as they work through their programs.

**As a result of all these improvements, Cheri and her team were able to 10X their revenue from the previous year—even while working through the 2020 COVID pandemic!**



“ In an industry that is very traditional in terms of medical paperwork and consent documents, Leverage allowed us to change our ‘traditional’ doctors office and innovate to create a better hospitality and client experience using technology.

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