



THE VALENS INSTITUTE: EXECUTIVE ASSETS

The Documentation Audit

Stop doing "Retroactive Archaeology"

The Problem

For academic physicians and healthcare leaders, documentation (charting, university forms, promotion tracking, teaching logs) is often the heaviest operational drag on Me, Inc. Most physicians wait until their annual university appraisal or billing deadline to track their academic achievements. They spend hours digging through old emails and schedules—doing "retroactive archaeology." This drains cognitive endurance and ruins weekends.

1 Identify Your 'Data Liabilities'

Where are you currently bleeding the most time? Check your operational friction points:

- Tracking resident/student teaching hours
- Logging CME/CPD credits
- Tracking research/publication milestones for promotion
- Clinical chart completion and billing

2 Implement the "1-Touch" Rule

If a piece of documentation requires you to touch it more than once, the system is broken. You must shift to "Point-of-Impact" Capture.

The Digital Form Strategy

Create a central documentation form (via Microsoft Forms, Google Forms, or your dedicated Valens Ledger) and bookmark it on the home screen of your phone. Do not wait until Friday. The exact moment a teaching session ends, take 30 seconds to input the data on your phone. One touch. Done.

Leverage the Data for Equity

Data capture is only useful if it generates leverage. How will you use this newly organized ledger at your next appraisal?



Negotiation

Use exact, logged teaching hours to objectively negotiate protected academic time.



Promotion

Present a flawless, data-backed portfolio for your next university promotion panel.



Divestiture

Use the data to prove a specific committee is inefficient, giving you leverage to step down.

The CEO's Challenge

Choose ONE documentation task that routinely ruins your Friday evenings. Map it to an automated form or build a templated macro for it by Tuesday. Reclaim your weekend.