

QUESTIONNAIRE



How Does Your Practice Want to Grow?

Every practice owner wants to be successful and profitable, but the path you take to get there might look different from the practice down the block from you. It's helpful to get clear on how you want to grow your practice and communicate that vision with your entire team so everyone has a part in achieving that.

Use this questionnaire to help you zero in on your practice's growth goals. Once you've identified your growth goals, you can work backwards with your front office manager and the rest of the team to figure out how you'll reach these goals.

Patient Base

Select one answer for each question

- | | | | |
|--|-----|----|--------|
| 1. Do you want more new patients? | Yes | No | Unsure |
| 2. Do you want to retain existing patients? | Yes | No | Unsure |
| 3. Do you want both new and existing patients? | Yes | No | Unsure |
| 4. Do you want to find more of your ideal patients for your profitable procedures? | Yes | No | Unsure |

Service Expansion

Select one answer for each question

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|--|-----|----|--------|
| 1. Do you want to add more services like orthodontics or treatments for conditions like sleep apnea and TMD? | Yes | No | Unsure |
| 2. Do you want to get into a new vertical or add more specialty services? | Yes | No | Unsure |

Practice Expansion

Select one answer for each question

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|--|-----|----|--------|
| 1. Do you want to sell your practice or be acquired? | Yes | No | Unsure |
| 2. Do you want to add more practices? | Yes | No | Unsure |

Team Expansion

Select one answer for each question

- | | | | |
|--|-----|----|--------|
| 1. Do you want to grow your clinical team, front office team, or both? | Yes | No | Unsure |
| 2. Do you want to create new roles? | Yes | No | Unsure |

Personal Growth

Select one answer for each question

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|--|-----|----|--------|
| 1. Do you want more work life balance? For example, do you want to have fewer workdays or fewer hours? | Yes | No | Unsure |
|--|-----|----|--------|

Based on how you responded to these questions, here are some recommendations to consider. Keep in mind there are many different ways to view success and profitability so it's up to you to decide what's most important.

1 If patient acquisition and/or retention are important, then here's what to consider:

- Invest in digital marketing strategies like SEO, organic and paid social, and PPC advertising to get more new patients through the door.
- Develop a strategic campaign calendar where you'll be in regular contact with patients to drive more appointments.

2 If expanding your services is a priority, then here's what to consider:

- Understand what services resonate with your ideal patients and what your current patient base values.
- Get the appropriate licenses and technology to offer these services at your practice.
- Market these new services using digital marketing strategies and in-office promotions.

3 If you want to expand your practice, then here's what to consider:

- Evaluate your most critical key performance indicators to understand your profitability and online reputation.
- Evaluate what processes and technology you need to invest in to get to the next stage of growth. You can't be stagnant.