



**PRACTICE**  
**ACCELERATION**  
RAPID PRACTICE GROWTH

# THE QUARTERLY PRACTICE REVIEW

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# PRACTICE MARKETING CHECK UP

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**“The ability to get new patients on demand is the ultimate super power”**

Tristan Bond

Lead flow is the lifeblood of your business.  
It's oxygen to fuel your fire.



# PRACTICE MARKETING CHECK UP

Complete the following so that you can add rocket fuel to your business in the next 90 days.

## Marketing:

Goal:

Actual:

New Patients:

Re-activations:

Total:

	Goal:	Actual:
New Patients:		
Re-activations:		
Total:		

## Which marketing channel did you promote?

- Email
- Text
- Social Media
- Other (include specifics)

What campaigns did you run?

- 1.
- 2.
- 3.
- 4.
- 5.

How many leads did each campaign generate?

- 1.
- 2.
- 3.
- 4.
- 5.

# PRACTICE MARKETING CHECK UP

Complete the following so that you can add rocket fuel to your business in the next 90 days.

What was the pipeline value of each campaign?  
(number of inquiries x goal service/procedure fee)

- 1.
- 2.
- 3.
- 4.
- 5.

Based on the above, which campaigns do you need to run again?

What went well?

What didn't go well?

# PRACTICE MARKETING CHECK UP

Complete the following so that you can add rocket fuel to your business in the next 90 days.

## Where focus goes, energy flows and results show

How much time and focus did you dedicate here?

What lessons did you learn?

What do you need to do differently this quarter to achieve your goals in this area?

What marketing tactics can you deploy and systemise from Practice Acceleration to achieve this?

What is your first step to take and when will you do this?





# PRACTICE CONVERSION AND RETENTION CHECK UP

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**“The purpose of a business is to  
create and keep a customer”**

Peter Drucker

The single greatest problem and missed opportunity in business is non-optimised sales (i.e revenue generated per sales opportunity).

Contrary to popular belief, ideal clients don't appear and open their wallets at will.

Prospects are converted into ideal patients by your conversion and retention process.

Complete the following so that you can quickly add profits and scale in the next 90 days



# PRACTICE CONVERSION AND RETENTION CHECK UP

Complete the following so that you can quickly add profits and scale in the next 90 days.

## Re-booking/sales:

	Goal:	Actual:
Core Services:		
Core Products:		
Upsells:		
Total:		

## For service professionals (i.e appt based)

	Goal:	Actual:
Case recommendation rate		
	Goal:	Actual:
Case acceptance rate		

## For product/procedure based professionals

	Goal:	Actual:
Products/procedures purchased		

# PRACTICE CONVERSION AND RETENTION CHECK UP

Complete the following so that you can quickly add profits and scale in the next 90 days.

## Where focus goes, energy flows and results show

How much time and focus did you dedicate here?

What went well?

What didn't go well?

What lessons did you learn?

What do you need to differently this quarterly to achieve your goals in this area?

What tactics and strategies can you deploy and systemise from Practice Acceleration to achieve this?

What is your first step to take and when will you do this?





# **MANAGEMENT AND LEADERSHIP**

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**“Management is doing things  
right; leadership is doing the  
right things.”**



# MANAGEMENT AND LEADERSHIP

What do you like about the way your team are performing? Why?

What could be working better? What difference would this make?

What do you not like about the way your team are performing? Why?

What would you prefer instead?

What will happen if things don't change in the next 90 days?

Why is now more important to change this than before?

What do you need to do to make this change? (i.e. upskill, move people on, hire new people, meeting structure, meeting rhythm)





# LET'S TALK ABOUT YOU!

How committed to your business growth have you been?

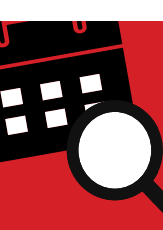
What results has this correlated to for you? (ROI = Return On Involvement)

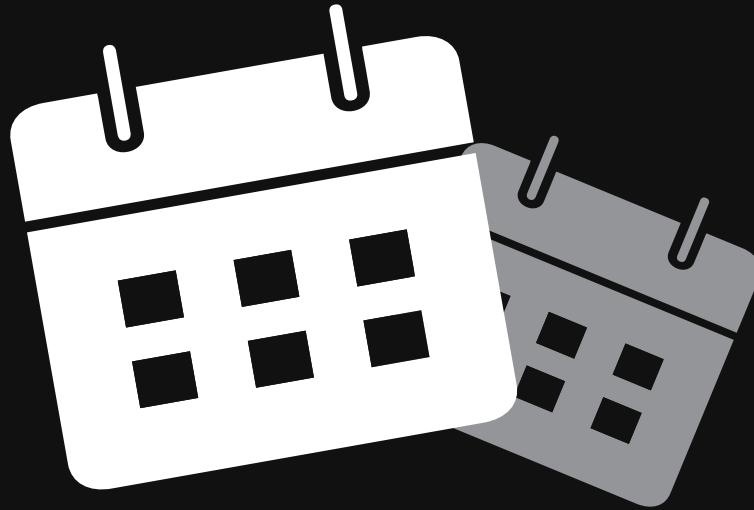
How could your level of accountability improve? (e.g posting in the FB group x Monday/Wednesday/Friday, attending coaching calls weekly etc)

How well did you show up for your business over the past 90 days?

How could you have shown up better?

What difference could it make if you showed up and played like a pro in the next 90 days?





## **QUICK ACTIONS** TO ADD TO YOUR CALENDAR FOR WINS AND INCREASING ENERGY:



Post in the Facebook group x 3 weekly minimum



Monday intentions for the week, Wednesday momentum update, Friday wins



Attend 1 or more coaching calls per week



Choose a resource from the membership area to implement in the next 7 days.

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Based on the scores above, list your top 5 priority areas to work on in the next 12 months:

**1**

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**2**

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**3**

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**4**

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**5**

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