

PRACTICE POTENTIAL WORKSHEET

The fillable forms require [Adobe Acrobat Reader](#) to be completed and submitted digitally. iPhones or iPads do not support Adobe Reader. You can also print the form out, completed it and email back to me at melinda@melindaheryford.com or fax to: (916) 488.2913

Target Operational Area	Your Results Last Year	What Would You Like
Production		
1. Hourly Production (doctor only)		
• New practice		
• Young practice (< 10 years)		
• Established practice (10+ years)		
2. Monthly Dr. Production (16 days)		
• New practice		
• Established practice		
3. Daily Production –ten consecutive days should have little variance		
4. Short-Notice Cancelled and Failed Appointments for each provider per month		
Continuing Care/ Hygiene		
1. Patient's in continuing care (with an appointment)		
2. Perio patients (percent practice in perio maintenance therapy)		
3. Average daily hygiene production (no assistant, including x-rays)		
4. Restorative diagnosis from Continuing Care		
5. Compensation		
6. Hygiene compensation of overhead		
New Patients		
1. New patients per month		
2. Average new patient value		
3. Number of internal referrals		
4. Total production diagnosed from new patients		
5. Case Acceptance (Treatment diagnosed divided by treatment accepted)		
Collections		

1. Collections percentage – average for last three months		
2. Accounts Receivable ratio 1 to 1.3 times average monthly production		
3. Accounts Receivable - 90+ days		
4. Percentage of Production collected over-the-counter		
5. Insurance turn-around		
6. Electronic billing		
7. Outside payment plans – interest free outside financing available		
8. Written financial arrangements		
Expenses and Profit		
1. Dental supplies		
2. Rent		
3. Lab		
4. Marketing		
5. Staff (see below)		
6. Doctors Salary		
7. Return on Investment/Solvency		
Staff		
1. Staff overhead percentage (excluding hygiene)		
2. Hygiene overhead percentage		
3. Benefits – (total staff)		
4. Staff meeting – one per week to implement change, one per month to sustain stability		
Marketing		
1. Budget (percentage of collections)		
2. Structured plan – determined every three months <ul style="list-style-type: none"> • Consistency – daily 		
3. Consistency – daily activity, discussed in weekly staff meeting		