



## **PRACTICE EVALUATION**

The following areas are evaluated for a comprehensive practice evaluation.

### **Executive Overview-The Big Picture**

- Overall health
- Major strengths
- Major concerns
- Immediate opportunities
- Long-term potential

### **The Current Reality**

- Production/Collection
- Overhead Percentage
- New Patient Flow
- Case Acceptance
- Recare Effectiveness
- Schedule Utilization

### **System Assessment**

- New patient experience
- Scheduling System
- Treatment Presentation
- Hygiene Department
- Financial Systems

### **Team Assessment**

- Accountability
- Role Clarity
- Morale & Culture
- Communication style
- Alignment with doctor's vision

### **Doctor Assessment**

- Leadership
- Delegation
- Financial comfort
- Vision Clarity
- Consistency

## **Prioritized Action Plan**

### **Phase 1: Stabilize ( 0-60 days)**

- Immediate corrections

### **Phase 2: Strengthen (2 to 6 months)**

- System implementation
- Leadership alignment
- Training focus

### **Phase 3: Growth (6-12 months)**

- Internal marketing
- Growth initiatives (new procedures, associate, reduce/eliminate PPO's, etc.)