

30 Proven Moves to Scale Your Practice

A structured execution planner built to help dental teams focus on what actually drives consistent growth.







Dental Practices Don't Lack Effort They Lack Structured Execution

Growth rarely slows because of one major mistake, it usually slows because small actions don't happen consistently.

*Growth Happens When
Execution Becomes Consistent*

This planner helps organize what to do, who owns it, and when to review progress.

 Missed calls	 Open schedule gaps
 Unscheduled treatment	 Lack of follow-through.

Individually, these feel manageable, together, **they slow momentum.**

This planner was built to help you:



Identify where
growth may be
slowing



Decide what
deserves
attention first



Assign
responsibility to
the right team
member



Track progress
weekly



Create
consistency
across your
practice

Not more ideas, clear execution.

Before You Start Implementing, Identify Where You Stand

Instructions: Rate each area from 1 to 5

1 = Needs Immediate Attention

5 = Performing Consistently

Call Handling

Do incoming calls get answered consistently?

Are calls converted into scheduled appointments?

Score: 1 2 3 4 5

Scheduling Efficiency

Is your schedule consistently full?

Are gaps managed proactively?

Score: 1 2 3 4 5

Case Acceptance

Are recommended treatments being scheduled consistently?

Do financial conversations happen confidently?

Score: 1 2 3 4 5

Patient Retention

Are patients returning consistently?

Are recall systems reliable?

Score: 1 2 3 4 5

Referral Systems

Do patients refer others regularly?

Does your team actively encourage referrals?

Score: 1 2 3 4 5

Team Alignment

Does your team know what matters most each week?

Are responsibilities clearly assigned?

Score: 1 2 3 4 5

Visibility & Patient Flow

Are patients finding your practice consistently?

Do new patient numbers feel predictable?

Score: 1 2 3 4 5

Financial & Production Systems

Do you track performance weekly?

Are targets clearly defined?

Score: 1 2 3 4 5

Start With One Move, Not All Thirty

Clarity drives results. Pick one move, assign ownership, and create a rhythm your team can sustain. And repeat.

STEP 1:
Review your
lowest scoring
areas

STEP 2:
Select one move
to focus on

STEP 3:
Assign
ownership

STEP 4:
Track weekly
progress

STEP 5:
Review results
monthly

The 30 Moves That Help Practices Identify Where Growth Is Slowing

Each move is designed to help you review one specific part of your practice, so you can quickly spot gaps, make adjustments, and move forward with clearer direction.

MOVE 1: Answer Every Call or Route It Immediately

Why It Matters:

Every missed call represents a patient who was ready to take action. Many practices underestimate how often calls go unanswered, especially during busy times. Even missing two or three calls per day can compound into hundreds of missed opportunities each year. Consistently answering calls strengthens patient flow and stabilizes scheduling.

When This Is Working:

- Calls are answered consistently
- Patients are scheduled quickly
- Team confidence increases
- Fewer voicemail messages go unreturned

When This Is Not Working:

- Voicemail fills up
- Patients hang up
- Staff feel rushed
- Schedule gaps increase unexpectedly

Start Here:

Track missed calls for one full week.

Write down:

How many calls were missed
What time they occurred
Who was responsible

Owner:

Front Desk Lead

How many calls were missed this week?

Write Number: _____

MOVE 2: Create Same-Day Appointment Availability

Why It Matters:

Patients who need care quickly often decide within minutes whether to schedule or move on to another office. When same-day availability doesn't exist, urgency is lost, and opportunities quietly disappear. Even one missed urgent appointment per day compounds into significant lost production over time. Consistent availability creates momentum, improves patient satisfaction, and increases daily production stability.

When This Is Working:

- Same-day appointments are intentionally reserved
- Urgent patients are scheduled quickly
- Team confidently offers available times
- Emergency calls convert into appointments
- Providers remain productive throughout the day

When This Is Not Working:

- Patients are told to wait several days
- Urgent cases go to competing offices
- Same-day openings feel reactive instead of planned
- Staff feel stressed when emergencies occur
- Production opportunities are lost unexpectedly

Start Here:

Reserve 2–4 same-day blocks daily.

Track how many get filled.

Owner:

Front Desk Lead

How many same-day appointments were made?

Write Number: _____

MOVE 3: Strengthen Online Scheduling Access

Why It Matters:

Today's patients expect convenience. If booking online is confusing, slow, or unavailable, many patients abandon the process without calling. This creates invisible lost opportunities that most practices never measure. Simple scheduling access increases patient flow, improves convenience, and supports steady growth.

When This Is Working:

- Patients can book appointments easily online
- Mobile scheduling works without friction
- Online bookings increase month over month
- Staff receive fewer scheduling-related calls
- New patient flow becomes more predictable

When This Is Not Working:

- Patients report difficulty scheduling online
- Booking links fail or feel confusing
- Website visitors don't convert into appointments
- Staff manually schedule most appointments
- Online traffic doesn't turn into patient visits

Start Here:

Test booking from a mobile phone.

Document obstacles.

Owner:

Front Desk Lead or Office Manager

What were the findings?

MOVE 4: Improve Google Review Requests

Why It Matters:

Reviews influence whether patients trust your practice before they ever call. Most patients compare multiple offices before making a decision. If reviews are inconsistent or outdated, confidence drops and competitors appear more trustworthy. A steady review flow builds credibility, increases call volume, and improves patient confidence.

When This Is Working:

- Review requests happen daily
- Patients leave reviews consistently
- Star ratings remain stable or improve
- Team members know when to request reviews
- Online presence feels strong and current

When This Is Not Working:

- Review requests happen randomly
- Long gaps occur between new reviews
- Competitors have significantly more reviews
- Team forgets to ask patients
- Online reputation feels stagnant

Start Here:

Assign daily responsibility for requesting reviews.

Owner:

Front Desk Lead or Office Manager

MOVE 5: Replace Stock Photos With Real Team Photos

Why It Matters:

Patients want to see who they will meet before choosing a provider. Stock photos reduce trust because they feel generic and impersonal. Real photos build familiarity, increase credibility, and help patients feel comfortable before their first visit. Visual trust often influences whether a patient calls or continues searching.

When This Is Working:

- Real team photos appear across the website
- Patients recognize team members before arrival
- Website feels authentic and personal
- Patient trust builds before the first visit
- Team takes pride in how the practice appears

When This Is Not Working:

- Website uses generic stock imagery
- Patients feel uncertain about the team
- Practice appears similar to competitors
- Website lacks personality
- Trust-building opportunities are missed

Start Here:

Review your website homepage and top service pages.

Look for:

Stock photos showing generic doctors or patients.

Images that don't represent your actual team.

Pages where no real team photos appear.

Areas where patients would expect to see your team.

Owner:

Marketing Coordinator or Office Manager

Tracking Prompt:

How many pages currently show real team photos instead of stock images?

Write number: _____

How many stock photos were replaced this month?

Write number: _____

MOVE 6: Create Clear Service Pages for High-Value Treatments

Why It Matters:

Patients often research treatments before calling. If service pages are unclear or incomplete, confidence drops and patients hesitate to move forward. Strong service pages build trust before the phone rings and help patients arrive informed and ready to commit.

When This Is Working:

- Patients ask informed questions
- Calls reference specific services
- Treatment discussions begin faster
- Case acceptance conversations feel smoother

When This Is Not Working:

- Patients seem confused
- Staff repeat the same explanations
- Website traffic doesn't turn into calls
- High-value treatments feel unpredictable

Start Here:

Identify your top 5 highest-value services.

Ask:

Does each have its own page?
Are real photos included?
Are benefits explained clearly?

Make a list of missing pages.

Owner:

Marketing Coordinator or Office Manager

Tracking Prompt:

How many core services currently have dedicated pages?

Write Number: _____

MOVE 7: Offer Financing to Every Patient Consistently

Why It Matters:

Many patients delay treatment because of payment timing, not lack of interest. Offering financing consistently removes hesitation and increases access to care. When financial flexibility becomes routine, case acceptance becomes more predictable.

When This Is Working:

- Financing is discussed routinely
- Patients feel supported
- Larger cases move forward
- Treatment plans convert faster

When This Is Not Working:

- Staff hesitate to discuss payment
- Patients delay decisions
- Treatment remains unscheduled
- Production fluctuates unexpectedly

Start Here:

Review the last 10 treatment presentations.

Ask:

Was financing discussed every time?

Record:

Yes or No

Owner:

Treatment Coordinator

Tracking Prompt:

Out of the last 10 cases, how many included financing discussion?

Write Number: _____

MOVE 8: Track Marketing Sources That Generate Calls

Why It Matters:

Without tracking marketing sources, decisions rely on guesswork instead of data. Understanding where patients come from helps prioritize effort and spending. Accurate tracking improves strategy and prevents wasted resources.

When This Is Working:

- Team knows where patients come from
- Decisions feel confident
- Resources are allocated wisely
- Growth patterns become visible

When This Is Not Working:

- Guesswork drives decisions
- Spending feels uncertain
- Growth appears random
- Opportunities get missed

Start Here:

Review the last 30 new patient calls.

Ask:

Where did each patient come from?

Write down:

Top 3 sources.

Owner:

Office Manager

Tracking Prompt:

What are your top 3 patient sources?

1: _____

2: _____

3: _____

MOVE 9: Reserve Emergency Appointment Blocks Daily

Why It Matters:

Emergency visits often become long-term patients. Without structured emergency availability, urgent care disrupts workflow and reduces efficiency. Planned emergency capacity improves organization and patient satisfaction.

When This Is Working:

- Emergencies fit smoothly
- Schedule remains organized
- Patients receive quick care
- Team stays calm

When This Is Not Working:

- Emergencies feel chaotic
- Schedules get overloaded
- Team stress increases
- Patient satisfaction drops

Start Here:

Reserve 1–2 emergency slots daily.

Track how often they fill.

Owner:

Scheduling Coordinator

Tracking Prompt:

How many emergency slots were filled this week?

Write number: _____

MOVE 10: Reduce Daily Schedule Gaps

Why It Matters:

Small schedule gaps often go unnoticed but accumulate into lost production. Monitoring daily gaps provides visibility and allows teams to respond quickly. Reducing downtime increases efficiency and improves overall stability.

When This Is Working:

- Schedule flows smoothly
- Providers stay productive
- Production feels stable
- Team monitors gaps actively

When This Is Not Working:

- Empty blocks appear frequently
- Staff scramble to fill time
- Production fluctuates
- Stress increases

Start Here:

Review yesterday's schedule.
Count total empty time blocks.

Owner:

Front Desk Lead

Tracking Prompt:

How many open gaps occurred yesterday?

Write number: _____

MOVE 11: Confirm Appointments Consistently

Why It Matters:

Unconfirmed appointments increase no-shows.

Consistency improves attendance and reliability.

When This Is Working:

- Patients arrive prepared
- Fewer last-minute cancellations
- Schedule stability improves

When This Is Not Working:

- Patients forget appointments
- Same-day cancellations increase
- Team scrambles to fill time

Start Here:

Review confirmation process.

Ask:

Are reminders sent at consistent intervals?

Owner:

Front Desk

Tracking Prompt:

What percentage of patients confirm appointments?

Write number: _____

MOVE 12: Track No-Show Patterns

Why It Matters:

No-shows are rarely random.

Patterns often reveal hidden scheduling problems.

Start Here:

Review the last 30 missed appointments.

Identify:

Time patterns

Patient types

Appointment types

Tracking Prompt:

What time block has the most missed visits?

Write answer: _____

MOVE 13: Use Short-Notice Lists to Fill Cancellations

Why It Matters:

Cancellations are unavoidable, but empty chair time doesn't have to be. A prepared short-notice list turns last-minute openings into productive time. Without this system, schedule gaps quietly reduce production and create unnecessary stress. Filling cancellations quickly maintains momentum and stabilizes daily productivity.

When This Is Working:

- Short-notice lists are updated weekly
- Patients accept earlier appointment offers
- Cancellation gaps are filled quickly
- Providers remain productive
- Team responds quickly to openings

When This Is Not Working:

- Cancellations create unused time
- Staff scramble to fill openings
- Patients are not contacted quickly
- Schedule gaps remain empty
- Production fluctuates unnecessarily

Start Here:

Create a list of patients who want earlier appointments.

Owner:

Scheduling Coordinator

Tracking Prompt:

How many cancellations were filled using short notice?

Write number: _____

MOVE 14: Schedule the Next Visit Before Patients Leave

Why It Matters:

Patients who leave without scheduling their next visit are less likely to return consistently. Delayed scheduling creates recall gaps and decreases long-term retention. Scheduling before checkout builds commitment and keeps patient care consistent.

When This Is Working:

- Patients leave with future visits scheduled
- Recall schedules remain full
- Team follows a consistent checkout process
- Patient retention improves
- Hygiene schedules remain stable

When This Is Not Working:

- Patients leave without future appointments
- Recall gaps increase
- Staff forget to schedule follow-ups
- Hygiene schedules fluctuate
- Retention becomes unpredictable

Start Here:

Observe checkout flow.

Does every patient schedule before leaving?

Owner:

Front Desk Team

Tracking Prompt:

What percentage leave without scheduling?

Write number: _____

MOVE 15: Review Provider Utilization Weekly

Why It Matters:

Provider time is one of the most valuable assets in the practice. Idle time represents lost production and missed growth opportunities. Reviewing utilization regularly reveals inefficiencies that might otherwise go unnoticed.

When This Is Working:

- Provider schedules remain productive
- Utilization rates are reviewed weekly
- Team adjusts schedules proactively
- Production stays stable
- Opportunities are identified quickly

When This Is Not Working:

- Providers experience idle time
- Production feels inconsistent
- Utilization isn't reviewed regularly
- Schedule gaps go unnoticed
- Growth feels unpredictable

Start Here:

Calculate weekly utilization rate.

Owner:

Office Manager or Practice Owner

Tracking Prompt:

Provider utilization rate:

Write number: ____ %

MOVE 16: Standardize Financial Conversations

Why It Matters:

Financial uncertainty is one of the most common reasons patients delay treatment. When financial conversations vary between team members, patients feel confused or hesitant. Standardized messaging builds confidence and supports higher case acceptance.

When This Is Working:

- Financial discussions follow a consistent process
- Patients clearly understand payment options
- Financing is offered confidently
- Treatment acceptance increases
- Team communicates with clarity

When This Is Not Working:

- Financial messaging varies between staff
- Patients feel uncertain about costs
- Financing is introduced inconsistently
- Treatment decisions are delayed
- Case acceptance fluctuates

Start Here:

Create a simple script outline.

[Reference Dental Case Acceptance Guide for more info.](#)

Owner:

Treatment Coordinator

Tracking Prompt:

How many financial conversations followed the script?

Write number: _____

MOVE 17: Present Treatment With Clear Options

Why It Matters:

Patients rarely move forward when treatment feels confusing or overwhelming. When options are presented clearly, patients feel more in control and less pressured. Without structure, treatment discussions feel inconsistent and case acceptance becomes unpredictable. Clear options increase confidence and improve decision-making.

When This Is Working:

- Treatment options are explained in simple language
- Patients understand recommended care
- Visual aids or examples are used
- Patients ask fewer clarification questions
- Acceptance conversations feel smoother

When This Is Not Working:

- Patients seem confused during presentations
- Staff provide inconsistent explanations
- Patients delay decisions
- Questions repeat frequently
- Case acceptance fluctuates unexpectedly

Start Here:

Review treatment presentation format.

Simplify explanations.

Owner:

Doctor or Treatment Coordinator

Tracking Prompt:

Do patients ask fewer clarification questions?

Yes/No

MOVE 18: Follow Up on Pending Treatment

Why It Matters:

Unscheduled treatment represents delayed care and lost production. Most patients do not move forward without reminders or reassurance. A structured follow-up system helps recover treatment that would otherwise remain unscheduled.

When This Is Working:

- Pending treatment lists are reviewed weekly
- Patients receive consistent follow-up
- More treatment gets scheduled
- Case momentum improves
- Production becomes more predictable

When This Is Not Working:

- Pending treatment lists go untouched
- Patients forget recommended care
- Staff rely on memory instead of systems
- Production opportunities are missed
- Case acceptance appears inconsistent

Start Here:

Generate pending treatment list.

Owner:

Treatment Coordinator

Tracking Prompt:

How many cases were followed up this week?

Write number: _____

MOVE 19: Track Case Acceptance Rates

Why It Matters:

What isn't measured rarely improves. Without tracking acceptance rates, practices rely on assumptions instead of facts. Monitoring this number helps identify whether presentation, financing, or communication needs improvement.

When This Is Working:

- Acceptance rates are reviewed monthly
- Trends are clearly visible
- Team identifies improvement areas
- Goals feel measurable
- Progress becomes visible

When This Is Not Working:

- Acceptance rates are unknown
- Team guesses performance levels
- Improvement feels random
- Growth feels unpredictable
- Opportunities are overlooked

Start Here:

Calculate monthly acceptance percentage.

Owner:

Office Manager or Treatment Coordinator

Tracking Prompt:

Case acceptance rate:

Write number: ____%

MOVE 20: Offer Payment Plans Consistently

Why It Matters:

Many patients delay treatment simply because they cannot pay upfront. Payment flexibility increases access to care and improves treatment acceptance. Without consistent payment options, patients postpone treatment unnecessarily.

When This Is Working:

- Payment options are discussed routinely
- Patients feel financially supported
- Larger cases move forward
- Staff feel confident discussing financing
- Treatment scheduling improves

When This Is Not Working:

- Financing is offered inconsistently
- Patients hesitate to schedule
- Staff feel uncomfortable discussing cost
- Cases remain unscheduled
- Production fluctuates

Start Here:

Review the last 10 cases.

Was payment flexibility offered?

Owner:

Treatment Coordinator

Tracking Prompt:

Number of cases offered financing:

Write number: _____

MOVE 21: Strengthen Patient Recall Systems

Why It Matters:

Recall systems protect long-term patient retention. When recall becomes inconsistent, patient relationships weaken and schedules become unpredictable. Reliable recall builds stability and protects recurring revenue.

When This Is Working:

- Recall reminders are sent consistently
- Patients return on schedule
- Hygiene appointments remain stable
- Patient retention improves
- Schedules stay predictable

When This Is Not Working:

- Recall lists grow longer
- Patients fall overdue
- Hygiene schedules fluctuate
- Staff struggle to rebook patients
- Retention decreases

Start Here:

Review overdue recall list.

Owner:

Hygiene Coordinator

Tracking Prompt:

Number of overdue patients:

Write number: _____

MOVE 22: Create a Referral Process

Why It Matters:

Referrals are one of the most trusted sources of new patients. Without a defined process, referrals happen randomly instead of intentionally. A structured referral system creates predictable word-of-mouth growth.

When This Is Working:

- Team asks for referrals consistently
- Patients mention referrals frequently
- Referral sources are tracked
- New patient flow increases
- Trust builds naturally

When This Is Not Working:

- Referral requests happen inconsistently
- Staff forget to mention referrals
- Referral tracking is unclear
- Growth depends heavily on advertising
- Referral numbers fluctuate

Start Here:

Develop referral scripts.

Owner:

Office Manager

Tracking Prompt:

How many referrals occurred this month?

Write number: _____

MOVE 23: Track Hygiene Reappointment Rates

Why It Matters:

Reappointments protect recurring revenue and long-term patient care. Without tracking, missed reappointments reduce stability and create unpredictable schedules.

When This Is Working:

- Patients rebook before leaving
- Hygiene schedules remain full
- Retention improves
- Future schedules remain predictable
- Team monitors performance regularly

When This Is Not Working:

- Patients leave without rebooking
- Hygiene schedules fluctuate
- Retention weakens
- Staff forget to monitor rates
- Future appointments decline

Start Here:

Measure reappointment percentage.

Owner:

Hygiene Coordinator

Tracking Prompt:

Rate:

Write number: ____%

MOVE 24: Map the Patient Experience Journey

Why It Matters:

Patient experience affects loyalty and referrals. Without mapping the journey, friction points go unnoticed. Identifying delays or confusion improves satisfaction and retention. Reviews influence trust before patients call.

When This Is Working:

- Patient journey steps are documented
- Staff follow consistent processes
- Transitions feel smooth
- Patients feel confident
- Feedback improves

When This Is Not Working:

- Patient experiences feel inconsistent
- Steps are unclear
- Staff rely on memory
- Delays occur frequently
- Patient satisfaction decreases

Start Here:

Walk through the full patient journey.

[See Patient Journey Blueprint for additional guidance.](#)

Owner:

Practice Owner or Office Manager

Tracking Prompt:

Where does friction occur most?

Write answer: _____

MOVE 25: Assign Ownership for Growth Areas

Why It Matters:

When responsibilities are unclear, tasks fall through the cracks. Clear ownership ensures accountability and consistency. Assigning responsibility strengthens performance across all systems.

When This Is Working:

- Each growth area has an assigned owner
- Responsibilities are documented
- Team members feel accountable
- Progress becomes measurable
- Execution improves

When This Is Not Working:

- Tasks are shared without clarity
- Responsibilities shift unpredictably
- Work gets delayed
- Team confusion increases
- Performance suffers

Start Here:

Assign one responsible team member per growth area.

Owner:

Practice Owner

Tracking Prompt:

Are responsibilities documented?

Yes/No

MOVE 26: Hold Weekly Growth Meetings

Why It Matters:

Without regular review, problems remain hidden until results decline. Weekly meetings create visibility and alignment. Short, focused reviews keep the team accountable and proactive.

When This Is Working:

- Meetings happen consistently
- Key numbers are reviewed weekly
- Team discusses progress openly
- Problems are identified early
- Momentum improves

When This Is Not Working:

- Meetings are skipped
- Performance issues go unnoticed
- Team communication weakens
- Problems compound
- Growth slows unexpectedly

Start Here:

Schedule weekly 15-minute review.

Owner:

Practice Owner or Office Manager

Tracking Prompt:

Did meeting occur this week?

Yes/No

MOVE 27: Set Clear Monthly Production Goals

Why It Matters:

Goals provide direction and purpose. Without clear targets, performance drifts and progress becomes inconsistent. Monthly production goals create focus and accountability.

When This Is Working:

- Monthly goals are clearly defined
- Team understands targets
- Progress is reviewed regularly
- Motivation improves
- Performance becomes predictable

When This Is Not Working:

- Goals are unclear
- Team lacks direction
- Performance fluctuates
- Progress feels uncertain
- Accountability decreases

Start Here:

Define monthly targets.

Owner:

Practice Owner

Tracking Prompt:

Monthly production goal:

Write number: _____

MOVE 28: Track Team Performance Metrics

Why It Matters:

Performance metrics reveal strengths and weaknesses. Without measurement, improvement becomes guesswork. Tracking team performance ensures consistent progress.

When This Is Working:

- KPIs are tracked consistently
- Team understands expectations
- Performance improves over time
- Accountability increases
- Trends become visible

When This Is Not Working:

- Metrics are not tracked
- Team relies on assumptions
- Performance varies
- Improvement stalls
- Opportunities are missed

Start Here:

Select 5 KPIs.

Owner:

Office Manager

Tracking Prompt:

KPIs selected:

Write list: _____

MOVE 29: Review Market Opportunities Annually

Why It Matters:

Markets change over time. Population growth, competition, and patient demand shift. Reviewing market conditions with your current marketing partner helps practices adapt before growth slows.

When This Is Working:

- Market trends are reviewed yearly
- Competitive awareness improves
- Growth decisions feel strategic
- Expansion opportunities become visible
- Planning improves

When This Is Not Working:

- Market changes go unnoticed
- Competitors gain advantage
- Growth feels reactive
- Opportunities are missed
- Strategy feels uncertain

Start Here:

Review surrounding population growth.

[Get the latest marketing opportunities report here.](#)

Owner:

Practice Owner

Tracking Prompt:

Market changes identified:

Write notes: _____

MOVE 30: Identify Your Largest Growth Bottleneck

(This becomes the most important move.)

Why It Matters:

Not all improvements produce equal results. Identifying the most impactful bottleneck allows focused effort and faster progress. Clarity in prioritization accelerates growth

When This Is Working:

- One primary focus area is identified
- Team understands priorities
- Effort feels organized
- Progress accelerates
- Improvements feel intentional

When This Is Not Working:

- Too many priorities compete
- Effort becomes scattered
- Progress feels slow
- Team feels overwhelmed
- Results remain inconsistent

Start Here:

Review all 30 moves.

Circle the one that would create the biggest impact.

Owner:

Doctor or Treatment Coordinator

Tracking Prompt:

Your #1 growth focus:

Write here: _____

Weekly Execution Worksheets

Use these worksheets to outline your weekly actions, identify obstacles early, and track measurable progress.

Week #: _____

Focus Move: _____

Assigned Team Member: _____

Actions This Week:

1. _____

2. _____

3. _____

Obstacles Identified:

Outcome:

Progress Rating:

1-5

Week #: _____

Focus Move: _____

Assigned Team Member: _____

Actions This Week:

4. _____

5. _____

6. _____

Obstacles Identified:

Outcome:

Progress Rating:

1-5

Week #: _____

Focus Move: _____

Assigned Team Member: _____

Actions This Week:

7. _____

8. _____

9. _____

Obstacles Identified:

Outcome:

Progress Rating:

1-5

Week #: _____

Focus Move: _____

Assigned Team Member: _____

Actions This Week:

10. _____

11. _____

12. _____

Obstacles Identified:

Outcome:

Progress Rating:

1-5

Week #: _____

Focus Move: _____

Assigned Team Member: _____

Actions This Week:

13. _____

14. _____

15. _____

Obstacles Identified:

Outcome:

Progress Rating:

1-5

Week #: _____

Focus Move: _____

Assigned Team Member: _____

Actions This Week:

16. _____

17. _____

18. _____

Obstacles Identified:

Outcome:

Progress Rating:

1-5

Monthly Growth Dashboard

Record your monthly numbers, review what changed, and identify the single move that will create the biggest impact next.

Track:

New Patients: _____

Case Acceptance Rate: _____

Schedule Utilization: _____

Production: _____

Recall Rate: _____

Reflection Questions:

What improved this month?

What slowed progress?

What deserves attention next?

If You Could Fix One Thing First... Which would it be?

Write: _____

Know **Where to Start First**

Practices discover something quickly when working through this planner:

Several areas need attention, but one usually matters more than the others. Starting in the right place creates momentum. Starting in the wrong place wastes time.

That's why many dentists choose to schedule a short growth review. During this conversation, we will gather the info needed to:

The wrong location can slow growth, while the right location can dramatically accelerate it.

- ✓ **Identify where progress is slowing**
- ✓ **Prioritize the most important move**
- ✓ **Build a clear starting sequence**
- ✓ **Answer questions about what you're seeing**

**Schedule Your 15-
Minute Growth Review**