

A resource by  HotDoc

# Tracking Your Key Metrics for Practice Growth: *Action Plan*

This planner will help you clearly outline where your practice is currently standing and map out goals for your practice's growth. With a clear overview of your Key Performance Indicators (KPIs), you'll be able to strategise with your team and implement a plan to achieve those goals.

Fill in your current results, a target for what you'd like to achieve, and a plan to get your practice from A to B. You can use this template as a meeting agenda at your morning huddles with your team to keep track of your practice's progress each month.

We recommend completing this plan at least once a month. That will help your team stay on the right track and achieve your goals sooner.

*In this document, we've included an Action Plan template with some pointers, as well as a blank template that you can print out to complete. If you would prefer a digital version, [click here](#) for the template in Google Slides format.*



Some pointers to get you started *[Blank template on following page]*



	Last Month's Results	This Month's Results	ACTION PLAN	Target
Active Patient Numbers		How much has your patient base grown? Did you lose any patients over the last month?	How can you increase growth?	
Case Acceptance Rates		How many cases has your practice closed over the month?	Where or how can you improve this?	
Reappointments and Recall Rates		What percentage of your patients are making appointments for their next visit?	How can you improve your patient communication skills?	
New Patient Retention		Are your new patients sticking around?	How can you build a relationship with new patients to keep them coming back?	
Referrals per Month		Are your patients referring their friends and family to come and see you?	Do you have a referral program? How can you improve your patient experience so that your patients want to rave about your practice to everyone?	
Types of Treatments Accepted		Which treatments are making up the most of your practice's production revenue?	How can you use this to focus on higher value treatments? Might this be an opportunity for a marketing campaign?	

# Key Metrics Results

Date \_\_\_\_\_



	Last Month's Results	This Month's Results	ACTION PLAN	Target
Active Patient Numbers				
Case Acceptance Rates				
Reappointments and Recall Rates				
New Patient Retention				
Referrals per Month				
Types of Treatments Accepted				