

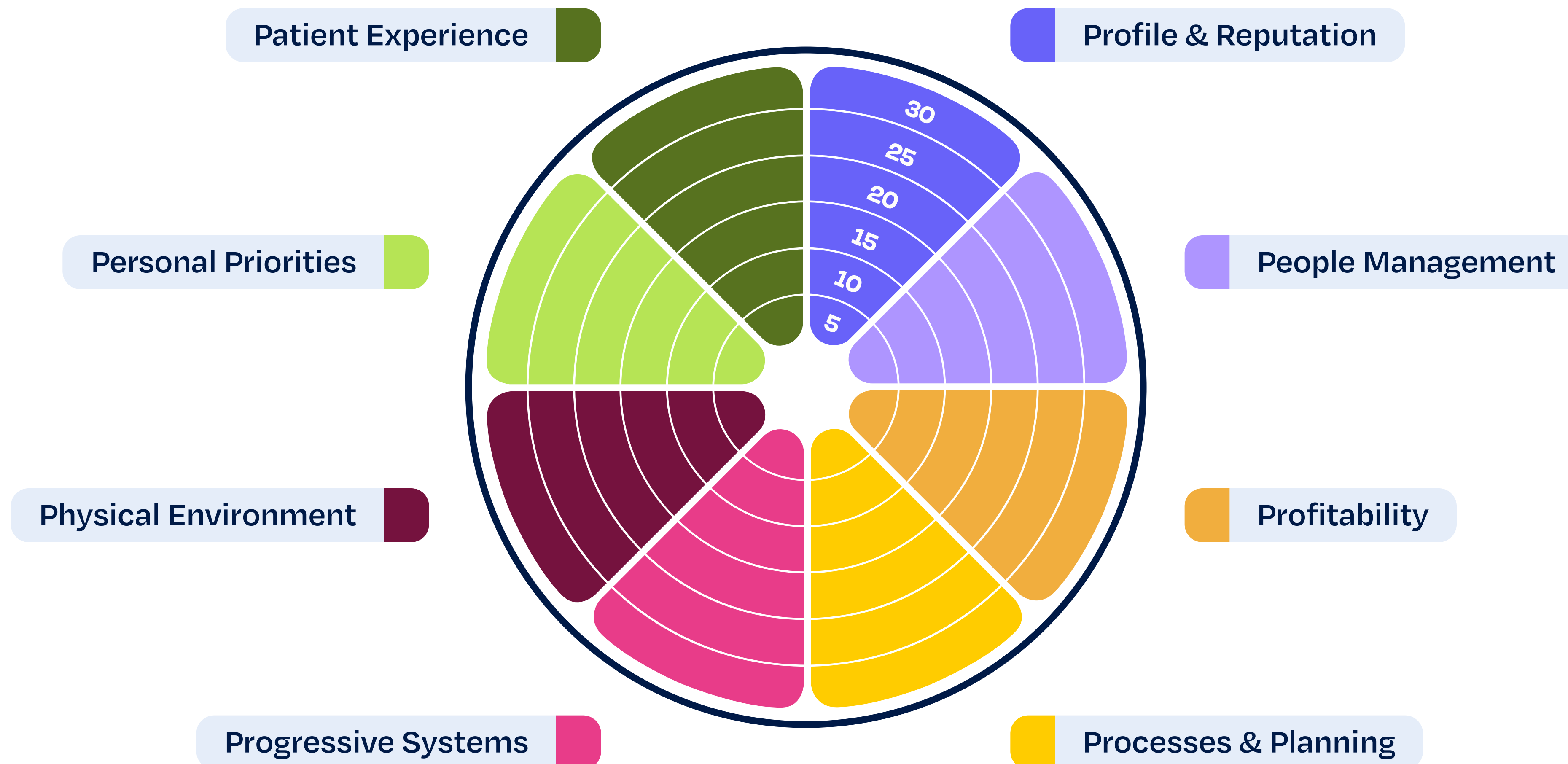
TAKE THE QUIZ

# How Healthy is Your Practice?





# 8 Performance Metrics for a Healthy Practice (8Ps)



# A Balanced Practice Rolls Easily (Like a Wheel)

Balanced Practice

Early-Stage Practice

Unbalanced Practice



# Quiz Overview



## How it Works

Each performance metric can be identified by answering the six statements about your practice, ranging from Strongly Disagree to Strongly Agree. The combined total of points, ranging from 5–30, will be plotted on our final chart.

Answer the statements as honestly and fairly as you can, as these help you learn what is working well and what may need improvement in your practice.

PRACTICE NAME:

TODAY'S DATE:

# Patient Experience

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

The vast majority of our patients are extremely satisfied with our service

☐ ☐ ☐ ☐ ☐

Our practice has created and uses a specific approach for getting great patient outcomes

☐ ☐ ☐ ☐ ☐

The vast majority of patients rebook to complete their recommended treatment plan

☐ ☐ ☐ ☐ ☐

Our practice has designed the patient experience to be personal, positive, and memorable

☐ ☐ ☐ ☐ ☐

Our patients feel connected with their practitioner and other practice team members

☐ ☐ ☐ ☐ ☐

A large proportion of new patients come to us via patient referrals and word-of-mouth

☐ ☐ ☐ ☐ ☐

# Profile & Reputation

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

Our practice has a clear brand image with defined colors and styles that we're proud of

☐ ☐ ☐ ☐ ☐

We have a great looking website that explains our services, introduces our team members, and conveys our philosophies or approach

☐ ☐ ☐ ☐ ☐

Our practice is easily found in online searches

☐ ☐ ☐ ☐ ☐

We have a blog and/or other online communications that answer common questions in our field of expertise

☐ ☐ ☐ ☐ ☐

Our practice has a strong reputation amongst other related practitioners in our local area

☐ ☐ ☐ ☐ ☐

We have effective systems in place for staying in contact with patients in between visits

☐ ☐ ☐ ☐ ☐

# People Management

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

Our team culture is both positive and performance-focused

☐ ☐ ☐ ☐ ☐

Everyone has a clear understanding of their role and responsibilities

☐ ☐ ☐ ☐ ☐

We conduct regular 1:1 meetings and performance reviews

☐ ☐ ☐ ☐ ☐

We hold regular team meetings for updates, brainstorming improvements, and monitoring progress

☐ ☐ ☐ ☐ ☐

We create regular social events to help team members know each other better

☐ ☐ ☐ ☐ ☐

Our practice has a network of professionals we use for specialist areas of the practice (e.g., bookkeeping, accounting, marketing, web design, etc.)

☐ ☐ ☐ ☐ ☐



# Profitability

SCORE: /30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

12345

The practice is profitable after everyone, including the practice owner, takes a healthy income

☐

☐

☐

☐

☐

We have sufficient cash reserves set aside to cover a downturn or unexpected expenses (e.g., 3 months' revenue)

☐

☐

☐

☐

☐

Our financial position is improving each month

☐

☐

☐

☐

☐

Our taxes are up-to-date and our accounts are regularly reviewed by an accountant

☐

☐

☐

☐

☐

We have an effective payment collection process in place

☐

☐

☐

☐

☐

Our pricing is regularly reviewed and is currently at an appropriate level

☐

☐

☐

☐

☐



# Processes & Planning

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

Our practice has a business plan that is regularly reviewed

☐ ☐ ☐ ☐ ☐

All practice management processes are clearly documented and referred to by team members

☐ ☐ ☐ ☐ ☐

Every patient session results in well documented treatment notes, in the format we have specified

☐ ☐ ☐ ☐ ☐

The practice has documented policies in place to cover most situations (e.g., no-shows, late payments, staff issues, security breaches, etc.)

☐ ☐ ☐ ☐ ☐

We have clearly defined KPIs in place for the practice and each team member

☐ ☐ ☐ ☐ ☐

We have a good idea of how the practice is performing at any given time

☐ ☐ ☐ ☐ ☐

# Progressive Systems

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

Patients can easily book appointments online

☐ ☐ ☐ ☐ ☐

Patients are automatically sent appointment reminders

☐ ☐ ☐ ☐ ☐

We provide options for telehealth where appropriate

☐ ☐ ☐ ☐ ☐

We have a well-managed waiting list

☐ ☐ ☐ ☐ ☐

Our patient records are online and include all necessary information (e.g., contact details, relationships, referrers, etc.)

☐ ☐ ☐ ☐ ☐

We have an efficient invoicing and payment collection in place

☐ ☐ ☐ ☐ ☐

# Physical Environment

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

We have rooms that are suitable for carrying out our work

☐ ☐ ☐ ☐ ☐

We have modern equipment that makes our work easier

☐ ☐ ☐ ☐ ☐

We have appropriate signage that is clear and consistent with our brand

☐ ☐ ☐ ☐ ☐

Our reception and waiting areas are welcoming and make patients feel at ease

☐ ☐ ☐ ☐ ☐

Our treatment rooms are decorated to make patients feel comfortable and project our desired brand image

☐ ☐ ☐ ☐ ☐

Our practice facilities are clean and clearly communicate a commitment to good hygiene

☐ ☐ ☐ ☐ ☐



# Personal Priorities

SCORE:

/30

Rate the following statements, 1 being Strongly Disagree, and 5 being Strongly Agree.

1 2 3 4 5

We have a clear vision for our practice that drives our business planning

☐ ☐ ☐ ☐ ☐

We have clear values that everyone understands and is committed to

☐ ☐ ☐ ☐ ☐

Our management team allocates time to work on the business each week

☐ ☐ ☐ ☐ ☐

Work is structured so that team members have sufficient time for family, friends, self care, and personal hobbies

☐ ☐ ☐ ☐ ☐

Anyone on the team can easily take 3 weeks off without the business suffering

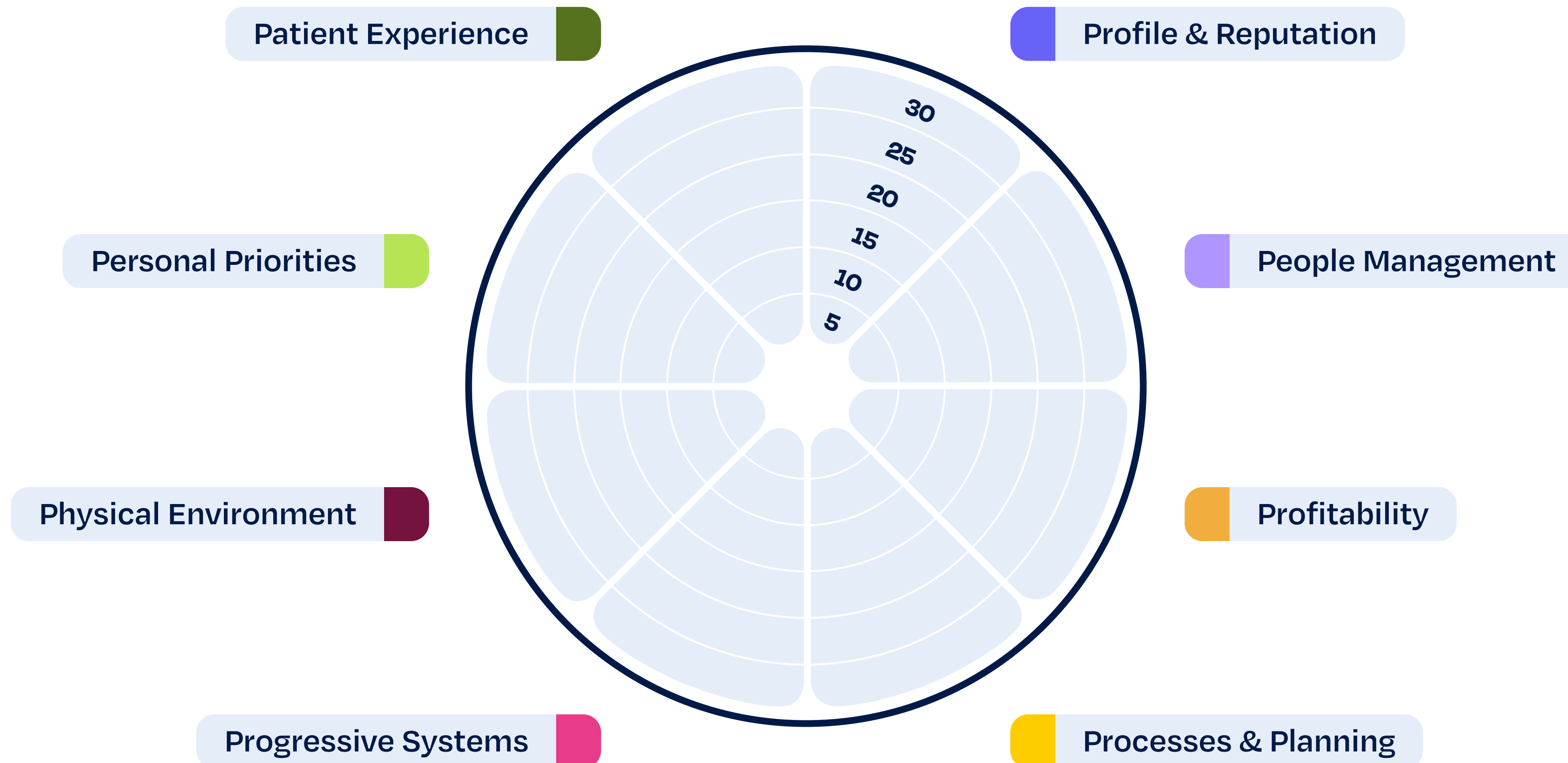
☐ ☐ ☐ ☐ ☐

Everyone on the team feels inspired and excited by the practice they're creating

☐ ☐ ☐ ☐ ☐

# Reading Your Results

Now, plot each of your performance metric scores in their corresponding segment of rings, and once your chart is fully plotted you'll see the overall health of your practice.



# Next Steps



Select two Performance Metrics for attention. Choose one or two things you'll work on in these areas, and write them down.

Performance Metric 1

Performance Metric 2

Next Review Date



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