

Practice Analysis Questionnaire

Client Information

Client Name

Employee Census (Name / Position / Salary)

List employees (Name – Position – Salary, one per line)

Description of Office Space (Current and Projected)

Patient Demographics (Number Of)

0 – 12

13 – 18

19 – 40

41 – 60

60+

Total

Socioeconomic Data (Subjective Percentage Estimate)**Poor (%)****Lower Middle Class (%)****Upper Middle Class (%)****Wealthy (%)****Total (%)****Financial Estimates (Previous 3 Years)****Year****Gross Income****Overhead****Net Profit**

Practice Goals and Expectations

Explanation of: "What do you want to do?" and "Why?"

What do you expect to achieve by hiring a consultant?

Describe your life goals, both wants and needs.

Approximate net worth (real estate, pensions, accounts, etc.).

Leadership

What values are important to you?

Does your practice live your values?

How should your team see you?

How should patients see the practice?

Income needed for the lifestyle you want:

Describe debt load and how it's managed:

Branding

Current customer base and target market:

How do patients currently see you? What should change?

How do patients communicate with others about your practice?

What do you want patients to tell friends about their experience?

What experience do patients currently have?

Business Systems

Procedures you lose money on:

How do you know? How is it measured?

High-risk patient groups receiving inadequate care:

How do you identify high-risk groups?

Services with the highest profit margins: