Thrive or Fail: Your Practice Scorecard

EFFICIENCY

WARNING SIGNS

- ☐ Lack of intentional systems
- ☐ Scaling clinic inefficiencies
- ☐ Decision fatigue
- ☐ Handing off to associate too soon
- ☐ Confusing skills with readiness
- ☐ Disengaging too early
- ☐ No staff support
- ☐ Misused staff time
- ☐ Too many staff
- ☐ Technical patient messaging
- ☐ Inconsistent messaging
- ☐ WEAK FOLLOW-UP SYSTEMS
- ☐ Unclear retention communication
- ☐ Team misalignment
- ☐ No reactivation plan
- ☐ Generic reactivation outreach
- ☐ Wrong reactivation message

SMART MOVES

- ☐ Clear, trackable systems
- ☐ Automated processes
- ☐ Independent team decision-making
- ☐ Defined associate metrics
- ☐ Deep associate training
- ☐ LONG-TERM ASSOCIATE PLAN
- ☐ Clear staff roles
- ☐ Controlled staffing costs
- ☐ Strong appointment systems
- ☐ Consistent patient education
- ☐ Story-driven messaging
- ☐ Outcome-focused education
- ☐ Automated patient follow-up
- ☐ Measure retention metrics
- ☐ Visible progress tracking
- ☐ Team training on retention
- ☐ Proactive reactivation strategy
- ☐ Layered reactivation systems

SUSTAINABILITY

WARNING SIGNS

- ☐ Optimism bias with debt
- ☐ Lifestyle debt creep
- ☐ Band-aid borrowing
- ☐ Overhead creep
- ☐ Not reviewing financials
- ☐ Write-off overspending
- ☐ No cash reserve
- ☐ Spending without plan
- ☐ Not tracking cash flow
- ☐ Underpricing services
- ☐ Mixing finances
- ☐ Growth without profit
- ☐ Growing too fast
- ☐ IGNORING PREPAID LIABILITIES
- ☐ NO PREPAID TRACKING
- ☐ Prepaid dependence
- ☐ NONCOMPLIANT PREPAIDS
- ☐ DIY 'expert' trap
- ☐ Sunk-cost trap
- ☐ Niche add-on trap

SMART MOVES

- ☐ Cash-flow positive debt
- ☐ Monthly overhead review
- ☐ Expense analysis
- ☐ Trend tracking
- ☐ Cost control discipline
- ☐ SEPARATE RESERVE ACCOUNTS
- ☐ AUTOMATED CASH TRANSFERS
- ☐ Use cash flow statements
- ☐ Streamlined resources
- ☐ Flexible growth strategies
- ☐ Prepaid tracking systems
- ☐ Subscription plan options
- ☐ Strategic prepaid management
- ☐ Delegation culture
- ☐ Invest in speed

QUESTIONS? Crystal Misenheimer | 737.241.2215 | crystal@progressivepracticesales.com

VIABILITY

WARNING SIGNS

- ☐ Underfunded start-up
- ☐ Too small too long
- ☐ Skipping expert guidance
- ☐ Not understanding purchase
- ☐ Overpaying for practice
- ☐ Overreliance on payors
- ☐ Overreliance on referrals
- ☐ Overreliance on staff
- ☐ Associate dependency
- ☐ Associate buyout assumptions
- ☐ Unsustainable compensation
- ☐ Oversized real estate
- ☐ Too much staff
- ☐ Premature expansion
- ☐ No financial roadmap
- ☐ Checking out too soon
- ☐ SLOW EXIT
- ☐ Going part-time
- ☐ Second act trap
- ☐ No exit plan
- ☐ Associate buyout misstep
- ☐ Late-career burnout

SMART MOVES

- ☐ Early savings habit
- ☐ Strategic early growth
- ☐ Profit-first focus
- ☐ Loan management
- ☐ Clear marketing systems
- ☐ Diversified payors
- ☐ Cross-trained staff
- ☐ Associate training plans
- ☐ Clear buyout plans
- ☐ Balanced compensation
- ☐ Engaged leadership
- ☐ Anti-fragile design
- ☐ Early exit planning
- ☐ Professional sale prep
- ☐ Mainstream services
- ☐ Valuation awareness
- ☐ Sale team assembled early

SMALL CHANGES, BIG IMPACT

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