

# - RATE YOUR CONVERSION AND RETENTION PILLAR -

The purpose of any business is to find a customer and then keep them.

Take a few minutes to put your conversion and retention pillar under the microscope.

## On a scale of 1-10

How would you rate the overall patient retention in your practice? (Does everyone retain to a similarly high degree, does everyone under retain, is there a variation between team members, do you have a documented system that everyone executes perfectly day in day out?)

1	2	3	4	5	6	7	8	9	10
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## TACTICS: PATIENT RETENTION TRACKER, PPO, CONVERSION CONSULT

What is the average patient retention for your practice? \_\_\_\_\_

On a scale of 1-10, how closely does this match your goal for patient retention?

1	2	3	4	5	6	7	8	9	10
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What is your personal average patient retention? \_\_\_\_\_

On a scale of one to 10 how closely does this match your goal for patient retention and what standard and message is this sending to your team?

1	2	3	4	5	6	7	8	9	10
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What is the average patient retention for each individual in your team?

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

## TACTICS: PATIENT RETENTION TRACKER, 6 Week Practitioner Turnaround

How would you rate your overall effectiveness at selling additional services and products beyond your primary healthcare service (Does this get done with ease at a high frequency, does it vary from person to person, does it not happen nearly enough)

1	2	3	4	5	6	7	8	9	10
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**TACTICS: NO PRESSURE SALES SYSTEM, SIGNATURE SYSTEMS**

How would you rate your ability to block book your patients for exactly what you recommend? (Is it 100% compliance for you and your team, does it vary from individual to individual, or does no one achieve successful block booking to 100%)

1	2	3	4	5	6	7	8	9	10
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**TACTICS: CONVERSION CONSULT, SIGNATURE SYSTEMS, DAY ONE CUSTOMER EXPERIENCE MAXIMISER**

How would you rate your ability and that of your team to own the room with your patients in the initial consult, take charge, get respect and control the direction of the consult with confidence in a timely manner? (extremely confident for everyone in your team, varies from person to person and can vary day to day, in the friend zone and letting patients take charge and determine next steps)

1	2	3	4	5	6	7	8	9	10
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**TACTICS: CONVERSION CONSULT, 6 WEEK PRACTITIONER TURNAROUND PROGRAM**

**CONCLUSION**

Now that you've gone through the conversion and retention pillar of your practice, how would you rate it's overall strength?

1	2	3	4	5	6	7	8	9	10
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How important do you think it will be to focus a lot of your time and resources on this area in the next 90 days?

Not Really	Somewhat	Important	Critical
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