

Is It Your Marketing, or Is It Your Front Desk?

A 30-minute audit that tells you which one is costing you the schedule.

AUDIT WINDOW • LAST 30 DAYS From _____ to _____

Pull the dates before you start and don't move them. Use one month, not a "good" month and not last week.

01 Count Your Leads

Open the call tracking you use, and count every new patient opportunity that came in. Not every call. Every *opportunity*.

Count it if a person who isn't already an active patient reached out about getting seen. **Don't count** existing patients, vendors, job applicants, wrong numbers, or anything you flatly don't do.

SOURCE	OPPORTUNITIES
Phone calls	
Web forms	
Website chat	
Text messages	
Social DMs (Facebook, Instagram)	
A. TOTAL LEADS	



02 Count What Got Booked



Go through that same list and count how many of those people ended up on the schedule. Booked, on the books, name in a slot.

B. TOTAL BOOKED _____

03 Do The Math



$B \div A \times 100 = \text{your conversion rate}$

_____ booked $\div$ _____ leads $\times 100 =$ _____ %

WHERE YOU SHOULD BE

Under 50% — there's money on the floor

50% — solid. What a normal, healthy practice hits

60%+ — where our strongest practices live

04 Read Your Result



- ☐ **Low leads • Conversion 50%+**
It's marketing. Your team is converting what they get, there just isn't enough coming in. Now it's a real conversation about spend and channels.

- ☐ **Healthy leads • Conversion under 50%**
It's the front desk. You're paying to generate calls and turning away more than half of them. Nothing you add to the ad budget fixes that.

- ☐ **Both low**
Fix conversion first. Every time. Pouring spend on top of a leak is how budgets disappear. It's fair to pull back while you fix it.

- ☐ **Both healthy • Still have gaps**
It's after the booking. Look at cancellations, reappointments, and confirmations. People cancel over voicemail. That's fixable.

05 Listen To Ten



The number tells you *what*. This tells you *why*. Pull ten calls that didn't book and listen. Tally what you hear:

WHAT HAPPENED	TALLY
Voicemail, then they'd already booked elsewhere	
"Do you take my insurance?" → no → click	
Price question, no conversation after it	
"I need to talk to my spouse"	
Someone other than your usual front desk answered	
Other: _____	

Your Answer

The gap in my schedule is mostly a

- ☐ marketing problem ☐ front desk problem
☐ post-booking problem

The one thing I'm changing this week:

Need A Hand? Let's Talk.

painfreedentalmarketing.com
(650) 681-0422

Book A 45-Min Strategy Session

