**Practice name:**

**Website:**

**Year established:**

**Type of practice:**

General

Periodontist

Endodontist

Orthodontist

Pediatric

Prosthodontist

Oral Surgery

Other

**# of dentists:**

**Average # weekly dentist treatment hours:**

**Average # weekly hygiene treatment hours:**

**# hygiene treatment rooms:**

**Average monthly dentist production:**

**Average monthly hygiene production:**

**Average # of new patients/month:**

**How much of an investment in marketing (digital, advertising, PR, direct mail, etc.) do you think it will take over the next 12 months to meet the goal(s) you have set for your practice?**

Under $10,000

Under $20,000

Between $21,000-$49,000

Between $50,000-$75,000

Over $75,000

**Describe your Ideal Patient as thoroughly as possible** (i.e. what are the age demographics of your patients? Have they been changing over the past several years?):

**Describe the core point of differentiation for your practice:**

**How many other dentists operate in the same market area?**

**List at least 3 of your biggest competitors and their perceived strengths** (include URLs and we will provide you with a competitive web analysis)

**Check all that apply – We use the following in our educational marketing and promotion:**

Blog

eBooks

White papers

Workshops

Seminars

Marketing collaterals

Articles

Testimonials

Case studies

Partner content

Media kit

Video

Podcast

Newsletter

Email drip

Patient content

**Check all that apply – We use the following to help build trust:**

Free assessment

Free “how to” content

Free/low cost trial offers

Special offers to switch

New patient orientation

Membership offerings

Results review sessions

Patient feedback tools

Patient-only events

Monthly follow up

Help desk and support

**Check all that apply – Our web presence includes:**

Website

Website analytics

Patient Relationship Management software

Blog

Local SEO (i.e. directories and citations)

Email lead capture form

Email newsletter

Email auto responder

Landing page(s)

Facebook page

Twitter profile

LinkedIn profile

Google My Business profile

Yelp profile

Pay-Per-Click advertising

**Check all of the tactics you currently use to generate leads:**

Outdoor advertising

Directory advertising

Direct mail

Social media

Radio/TV

Direct sales

SEO/SEM

Pay-Per-Click advertising

Word of mouth

Print advertising

Online advertising

Publid relations

Referrals

Email promotions

Coupons

Flyers

**Describe your lead conversion (sales) process:**

**Check all that apply – We track…**

Annual revenue

Marketing cost/customer

Number of leads

% of leads converted

Average transaction/patient

# of referrals

PR mentions

Social media mentions

Patient satisfaction

Profit per patient

Testimonials

Patient results

**Do you have and use a marketing plan?**

**Do you have and use a marketing calendar?**

**Describe your greatest marketing challenge right now.**

**I foresee making changes to our marketing in the next year because (check those that apply):**

I want to grow my practice

I want my marketing to be more effective

I want to be more proactive

I want a better work/life balance

I want to take a systematic approach to marketing

I want to introduce a new product or service to the market

I want to enter a new market

Other