

SAMPLE · WELLNESS AND HEALTH PRACTICES

The numbers we track

Wellness Practice

This is a sample. Wellness Practice is a fictional company and every figure in this document is invented. The figures match the sample Business Analysis.

The first Business Analysis produced 10 main numbers and 47 supporting numbers for Wellness Practice. All 57 are measured again every three months against the values dated 30 September 2026.

How the list works

- **The owner reads ten.** The main numbers are the scorecard. They appear in the quarterly Business Analysis and the Monday report.
- **We track the other 47.** The supporting numbers explain why a main number moved. They appear in the quarterly analysis only where they matter.
- **Every number has a dated starting value** agreed with the owner at the first readout.
- **No outside "in range" figures are used.** A number is not judged against an industry average, because no average describes this practice, its prices or its patients. Each number is compared with its own value on 30 September 2026 and with the direction that is better.
- **Seasonal numbers are compared with the same quarter a year earlier.** January is this practice's strongest month and December its weakest. Those numbers are marked "seasonal" below.
- **Nothing here identifies a patient.** Every number is a count, a share, a time or an amount.
- **Each number gets one of three readings every quarter:**
 - **Working:** it moved the right way, and the records show our change is the likely reason.
 - **Watch:** it has not moved, or it is too early to tell.
 - **Adjust:** it moved the wrong way, or the change we made is not producing the effect. The approach changes next quarter.

The ten main numbers

MAIN NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM	FIX
Revenue, last 12 months	\$1,150,000	Higher	QuickBooks	All
New patients, last 12 months	612	Higher	Jane	1
New patients who came back a second time	69%	Higher	Jane	2
New patients who left the first visit with the next one booked	62%	Higher	Jane	2
Open hours that were booked (seasonal)	71%	Higher	Jane	1
Late cancelled slots that were refilled	18%	Higher	Jane	1
New inquiries with no reply	57 a quarter	Lower	Quo, website form, Meta Ads	1
Patients quiet for 90 to 180 days	412	Lower	Jane	2
Arrived visits with no charge and no explanation	29 a quarter	Lower	Jane	3
Owner's hours a week on office work	12	Lower	Owner's estimate	3

Two of these are yearly counts in the first analysis: 229 inquiries with no reply and 116 unexplained visits. They are shown here by the quarter, because that is how they are measured from now on.

Supporting numbers

Answering and new patients

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Share of inbound calls missed	23%, and 41% between 12 and 2	Lower	Quo
Callers not in Jane who were never called back	148 a year	Lower	Quo and Jane
Time to first reply on a website inquiry	19 hours	Lower	Website form and email
Website inquiries never answered	34 a year	Lower	Website form and email
Time to first contact on a Meta lead	2.4 days	Lower	Meta Ads and Quo
Share of answered inquiries that became a first visit	52%	Higher	Website form, Meta Ads, Jane
Days until the next new patient opening, practitioners 1 and 2	15	Lower	Jane
New patients booked with practitioners 1 and 2	57%	Lower	Jane
New patients referred by a patient	192 of 600	Higher	Jane
Cost per new patient from Meta Ads	\$360	Lower	Meta Ads and Jane
Share of Meta spend shown more than 15 miles away	34%	Lower	Meta Ads

Patients kept

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
New patients who came a third time	55%	Higher	Jane
Return rate when the next visit was booked, and when it was not	90% and 35%	Higher	Jane
Share leaving with a visit booked, lowest and highest practitioner	44% and 81%	Higher	Jane
Average first year value of a new patient	\$571	Higher	Jane
Patients seen in the last 12 months	1,640	Higher	Jane
Patients quiet for 180 days to two years	1,236	Lower	Jane
Median days between visits, regular patients	19	Lower	Jane
Patients who stopped with a recorded reason	None	Higher	Jane

The schedule

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Open hours not booked	2,509 a year	Lower	Jane
Share of hours booked, fullest and emptiest practitioner	91% and 51%	Closer together	Jane
No-shows, share of appointments (seasonal)	3.7%	Lower	Jane
Late cancellations, share of appointments (seasonal)	5.4%	Lower	Jane
Booked slots that ended empty	1,470 a year	Lower	Jane
Appointments with a text reminder	68%	Higher	Jane
Appointments patients booked online	31%	Higher	Jane
Waitlist names on the spreadsheet, and in Jane	64 and 7	All in Jane	Shared spreadsheet and Jane
Revenue per booked hour	\$177	Higher	QuickBooks and Jane

Billing and money

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Chart notes unsigned for more than 7 days	143	Lower	Jane
Rejected claims never sent again	68, billed at \$6,200	Lower	Jane
Days for an insurer to pay	34	Lower	Jane
Money owed to the practice	\$96,400	Lower	Jane
Money owed for more than 90 days	\$32,800	Lower	Jane
Active patients with no card on file	61%	Lower	Jane
Largest insurer's share of revenue	13.4%	Lower	Jane and QuickBooks
Operating profit	11.0%	Higher	QuickBooks

Packages and prepaid visits

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Prepaid visits not yet used	1,148, worth \$74,600	Lower	Jane
Prepaid visits held by patients quiet for 180 days or more	392, worth \$25,500	Lower	Jane
Package balances that differ between Jane and the spreadsheet	41	Lower	Jane and shared spreadsheet

Records and software

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Duplicate patient records	214	Lower	Jane
Working logins held by people who have left	4	Lower	Every program
Software cost a year	\$13,920	Lower	QuickBooks

What patients say

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Google reviews and rating	214 at 4.8	Higher	Google Business Profile
New reviews, last 12 months	17	Higher	Google Business Profile
Reviews with no reply	31	Lower	Google Business Profile

The owner's and the front desk's time

NUMBER	30 SEPTEMBER 2026	BETTER IS	WHERE IT COMES FROM
Owner's hours a week on front desk questions	5	Lower	Owner's estimate
Front desk hours a week on cancellation calls and the waitlist	9	Lower	Front desk's estimate

How the first quarterly check would read

This is an invented example of the main numbers at the first quarterly check, dated 31 December 2026.

MAIN NUMBER	30 SEPTEMBER	31 DECEMBER	READING	WHAT IT MEANS
Revenue, last 12 months	\$1,150,000	\$1,161,000	WATCH	One quarter is too short to judge a yearly figure.
New patients, last 12 months	612	604	WATCH	The owner paused Meta Ads in October. 141 new patients came in the quarter, against 149 a year earlier.
New patients who came back a second time	69%	71%	WATCH	A patient needs 90 days to be counted. These patients first came before the changes began.
New patients who left the first visit with the next one booked	62%	79%	WORKING	111 of 141 new patients this quarter left with a visit booked.
Open hours that were booked	71%	70%	WATCH	The same quarter last year was 69%. December is always the weakest month.
Late cancelled slots that were refilled	18%	21%	ADJUST	Offers went to one waiting patient at a time, and most slots passed before anyone said yes. Next quarter: the waitlist moves into Jane with each patient's preferred days, and an opening is offered to five people at once.
New inquiries with no reply, in the quarter	57	4	WORKING	Every missed call from a number not in Jane gets a text back.
Patients quiet for 90 to 180 days	412	389	WATCH	Notes went out in November. 21 patients have booked so far.
Arrived visits with no charge and no explanation, in the quarter	29	6	WORKING	The weekly match catches them within seven days.
Owner's hours a week on office work	12	10	WORKING	Owner's estimate. Fewer schedule questions reach the owner.

The "Adjust" row is the point of the quarterly check. It shows the owner what did not work and what changes because of it.



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