

SAMPLE · WELLNESS AND HEALTH PRACTICES

Quarterly Business Analysis

Wellness Practice

Prepared for the owner of Wellness Practice. Your main numbers as of 31 March 2027.
This is your second quarterly analysis. We run a new one every three months. Prepared
by Sannidhi, Santa Cruz, California.

This is a sample. Wellness Practice is a fictional company and every figure in this document is invented. The format is what a real client receives every quarter.

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From your data means counted from your own records. **Our estimate** means a projection, with its assumption stated. Nothing in this document identifies a patient.

01

The short version

Eight of your ten main numbers are working, one is on watch, and one needs adjusting.

WHAT IS WORKING

- **Almost nobody who contacts you goes unanswered.** Inquiries with no reply went from 57 a quarter to 2. FROM YOUR DATA
- **New patients leave with the next visit booked.** 84% do, up from 62%. FROM YOUR DATA
- **More new patients come back.** 76% came a second time, up from 69%. FROM YOUR DATA
- **Cancelled slots are being refilled.** 47% of late cancelled slots were refilled this quarter, up from 18%. This is the number that needed adjusting last quarter. FROM YOUR DATA
- **Visits are billed.** Unexplained visits with no charge went from 29 a quarter to 3. FROM YOUR DATA

WHAT NEEDS ADJUSTING

- **New patients now wait 24 days to see your two fullest practitioners, up from 15.** More returning patients filled those two calendars. In January to March, 38 people who were answered the same day chose not to book because of the wait. FROM YOUR DATA

THE THREE THINGS TO FIX NEXT QUARTER

1. Offer new patients the practitioners who have room.
2. Contact the patients who hold prepaid visits and have not been in for 180 days.
3. Ask for a referral and a review after the fourth visit.

Your scorecard

MAIN NUMBER	30 SEPTEMBER 2026	31 DECEMBER 2026	31 MARCH 2027	READING
Revenue, last 12 months	\$1,150,000	\$1,161,000	\$1,187,000	WORKING
New patients, last 12 months	612	604	619	ADJUST
New patients who came back a second time	69%	71%	76%	WORKING
New patients who left the first visit with the next one booked	62%	79%	84%	WORKING
Open hours that were booked, January to March	72% a year earlier		77%	WATCH
Late cancelled slots that were refilled	18%	21%	47%	WORKING , after an adjustment
New inquiries with no reply, in the quarter	57	4	2	WORKING
Patients quiet for 90 to 180 days	412	389	341	WORKING
Arrived visits with no charge and no explanation, in the quarter	29	6	3	WORKING
Your hours a week on office work	12	10	9	WORKING

Revenue is read as working with a caution. It is up 3.2% in six months. In the year before we started it grew 3.2% in twelve months with none of these changes, and January is always your strongest month. Part of this growth would have come anyway.

The return rate rests on one quarter. A patient needs 90 days to be counted, so the 76% describes the 141 patients who first came in October to December. 107 of them came back. One quarter of 141 people is encouraging. It is not yet a pattern.

Booked hours are compared with the same months a year earlier, because January to March cannot be judged against the full year. The gain is real. It is on watch because it is uneven, as section 5 explains.

The quiet patient number needs care. It fell from 412 to 341. 58 of those patients came back. Others simply passed 180 days and moved into the next group, which grew from 1,236 to 1,262. That part of the drop is not an improvement.

What worked, and why we think so

Answering. Every missed call from a number that is not in Jane gets a text within a minute. Website and Meta inquiries reach the front desk's phone and get a reply the same day. You still miss 22% of calls, and that is normal for a desk of two. 46 people who were first reached by a text back or a same day reply became patients, and they have paid \$15,674 so far. FROM YOUR DATA

The next visit, booked at the desk. Each practitioner now walks a new patient to the desk, and the front desk offers the next visit before taking payment. 144 of 172 new patients this quarter left with a visit booked. The lowest practitioner moved from 44% to 71%. FROM YOUR DATA

Patients going quiet. Each practitioner gets a Monday list with a short note drafted for each patient, and approves or changes it. Notes went to all 412 patients in the first group. 58 booked a visit, and together they have made 203 visits worth \$17,661. FROM YOUR DATA

Billing. Arrived visits are matched to charges every week. Of the 116 unexplained visits in the first analysis, 74 were billed. You chose to leave the other 42 as free or too old to bill. The weekly match caught 31 new ones in six months. Those 105 visits were billed for \$9,135, and \$8,004 has been collected. FROM YOUR DATA

Rejected claims. 41 of the 68 were still inside their filing deadline and were sent again. 33 have been paid, for \$2,640. 8 are waiting on the insurer. FROM YOUR DATA

Chart notes. Each practitioner gets a Monday list of their own unsigned notes. Notes unsigned for more than 7 days fell from 143 to 22. FROM YOUR DATA

One record. The four old logins were removed in the first week. The package tracker was settled against Jane in February, and all 41 differing balances were corrected with a practitioner checking each one. The spreadsheet is retired. FROM YOUR DATA

Meta Ads. You paused the ads on 15 October and restarted them on 5 January, within 10 miles and at \$1,200 a month. Since then you have spent \$3,450 and gained 15 patients, which is \$230 each against \$360 before. It is too early to say how many will come back. FROM YOUR DATA

Money the records link to this work, in six months: \$51,200. That is \$15,674 from people reached by a text back or same day reply, \$6,090 from 70 slots filled by a waitlist text, \$17,661 from quiet patients who booked after a note, \$9,135 in visits billed by the weekly match, and \$2,640 in claims sent again. You have paid Sannidhi \$3,000 in that time. The records show each of these followed one of our actions. They cannot prove that none of them would have happened anyway. Some of those patients would have called back, and some would have returned without a note.

What is not in that figure. More new patients are coming back, and over a year that is likely worth more than anything above. No record ties one patient's return to the booking at the desk, so we have not counted it.

What we adjusted last quarter, and what happened

In December, 21% of late cancelled slots were refilled, against 18% before. That was 43 of 204, and only 9 came from a waitlist text. Your answer to the wand question was not being met.

Two things were wrong. Offers went to one waiting patient at a time, with two hours to answer, and most slots passed before anyone said yes. And the list itself was the old spreadsheet: 23 of its 64 names were stale, and it did not say which days a person could come.

We changed three things in January. The waitlist moved into Jane, and your front desk asked each person which practitioner and which days they wanted. An opening is now offered to up to five matching people at once, and the first yes gets it. Slots with less than 4 hours of notice go only to people who said short notice suits them.

In January to March, 90 of 192 late cancelled slots were refilled, or 47%. 61 of those came from a waitlist text. The Jane wait list holds 52 people today. Your front desk's time on cancellation calls fell from 9 hours a week to 4. *From your data and your front desk's estimate.*

What needs adjusting now

Your two fullest practitioners have no room for new patients. Returning patients are good news, and they filled the two calendars that were already nearly full. FROM YOUR DATA

PRACTITIONER	SHARE OF HOURS BOOKED, YEAR TO SEPTEMBER 2026	SHARE BOOKED, JANUARY TO MARCH 2027
1, chiropractic (you)	91%	96%
2, acupuncture	87%	94%
3, chiropractic	69%	76%
4, acupuncture	58%	64%
5, acupuncture	51%	57%
All five	71%	77%

A new patient now waits 24 days for practitioner 1 or 2, up from 15. Practitioners 4 and 5 can still see one within 2 days.

That wait is why the new patients number reads "Adjust." We answer almost every inquiry, and fewer of them book. Of the website and Meta inquiries answered this quarter, 59 of 132 became a first visit, or 45%, down from 52%. Your front desk now records why a person does not book, and 38 said the wait.

FROM YOUR DATA

The decision for you. 96 of the 172 new patients this quarter went to practitioners 1 and 2. 61 of those 96 stated no preference when they booked. They were given the first name on the list. We suggest that a new patient with no preference is offered practitioner 3, 4 or 5 first, at the desk and on the online booking page. Anyone who asks for a practitioner by name still gets that practitioner.

If half of the 38 who left over the wait had been seen within 2 days, that is 19 patients at \$571, or about \$10,800 for the quarter. **OUR ESTIMATE** It is your call, because it changes who sees whom and it affects your practitioners' pay. The wording for the desk and the booking page is drafted for you to read.

06

What the changes cost

- **Pausing Meta Ads cost you new patients.** Meta brought 4 new patients in October to December, against 16 a year earlier. Total new patients that quarter were 141, against 149. You saved about \$4,860 in ad spend. **FROM YOUR DATA**
- **27 rejected claims were past their deadline** and cannot be paid. That money is gone. The weekly check now sends a rejected claim again within seven days.
- **Checkout takes longer.** Offering the next visit adds about two minutes for each patient. At 5 in the evening there is now a line at the desk. *Your front desk's estimate.*
- **9 patients asked not to be contacted again** after a note. Each is marked in Jane and will not receive another.
- **The late cancellation fee.** You chose in November to charge it from a patient's second late cancellation. 129 fees were charged, for \$5,160. Two patients complained, and one left a two star review. The fee is your decision and is not in the money figure above.

07

Supporting numbers that moved

NUMBER	30 SEPTEMBER 2026	31 MARCH 2027
Callers not in Jane who were never called back	148 a year	3 in six months
Time to first reply on a website inquiry	19 hours	2 hours
Time to first contact on a Meta lead	2.4 days	20 minutes
Share of answered inquiries that became a first visit	52%	45%
Days until the next new patient opening, practitioners 1 and 2	15	24
Cost per new patient from Meta Ads	\$360	\$230
Share leaving with a visit booked, lowest practitioner	44%	71%
Patients who stopped with a recorded reason	None	64 this quarter

NUMBER	30 SEPTEMBER 2026	31 MARCH 2027
Waitlist names on the spreadsheet, and in Jane	64 and 7	0 and 52
Appointments with a text reminder	68%	81%
No-shows, share of appointments	3.7%	3.1%
Chart notes unsigned for more than 7 days	143	22
Rejected claims never sent again	68	0
Money owed for more than 90 days	\$32,800	\$21,400
Package balances that differ between Jane and the spreadsheet	41	0
Duplicate patient records	214	12
Working logins held by people who have left	4	0
Software cost a year	\$13,920	\$12,504
Front desk hours a week on cancellation calls and the waitlist	9	4

Why patients stopped this quarter. 64 patients were marked as finished or declined to rebook, with a reason. 29 said they felt better, 14 named cost, 9 moved or changed insurance, 8 named scheduling, and 4 were unhappy with their care. This is the first quarter the reasons were recorded. FROM YOUR DATA

08

Changes to what we measure

- **Added:** days until the next new patient opening, for each practitioner. It was a supporting number for two practitioners six months ago. It is the main problem now, and it joins the scorecard.
- **Retired:** package balances that differ between Jane and the spreadsheet. The spreadsheet no longer exists, so there is nothing left to compare.

The list of numbers is expected to change as the practice does.

Next quarter

FIX	WHAT GETS DONE	WHAT WE WILL WATCH
1. New patients to open calendars	If you approve, a new patient with no preference is offered practitioner 3, 4 or 5 first, from April.	Days until the next new patient opening. Share of answered inquiries that became a first visit. Share of hours booked for each practitioner.
2. Prepaid visits	79 patients have not been in for 180 days and still hold 356 prepaid visits. Each gets a note from their own practitioner, approved by that practitioner, saying the visits are waiting.	Prepaid visits held by quiet patients. Patients quiet for 180 days to two years.
3. Referrals and reviews	After a patient's fourth visit, a thank you goes out in your voice with a review link, and the practitioner asks in person who else might be helped.	New patients referred by a patient. New reviews.

Cost. Sannidhi: \$500 a month, unchanged. No new software. The two cancelled tools save \$118 a month.

Your largest insurer. It is still about 13% of revenue, on the 2022 fee schedule. You still depend on it as much as before. Your biller has the renewal date, and we have put it on the Monday report.

What we still cannot tell

- **Whether the higher return rate will hold.** One quarter of new patients is a start. Two more quarters will settle it.
- **Whether practitioners 4 and 5 keep new patients as well as 1 and 2 do.** They have seen too few to compare. Fix 1 will produce the answer.
- **Where patients drop after the second and third visit.** Reasons have been recorded for three months. A full year is needed.
- **What the prepaid visits mean for your books.** How they are recorded is a question for your accountant, and it is still open.



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This is a sample. Wellness Practice is a fictional company and every figure in this document is invented. The format is what a real client receives every quarter.