

Growth Planning and Business Performance Worksheets

This workbook is designed to help dental practices turn goals into action. Each section includes practical worksheets, formulas, and examples to support planning, decision-making, and performance reviews.

Worksheet 1: Growth

Use this worksheet to understand your current position, identify growth opportunities, and prioritise initiatives that will have the greatest impact.

Key Formulas

Patient Growth Rate = (New Patients – Lost Patients) ÷ Total Active Patients × 100

Revenue Growth Rate = (Current Period Revenue – Previous Period Revenue) ÷ Previous Period Revenue × 100

Capacity Utilisation (%) = Booked Chair Hours ÷ Available Chair Hours × 100

New Patients	Lost Patients	Total Active Patients	Patient Growth (%)

Current Period Revenue	Previous Period Revenue	Revenue Growth Rate (%)

Booked Chair Hours	Available Chair Hours	Capacity Utilisation (%)

Growth Area	Opportunity Identified	Impact (Low/Med/High)
Patient Acquisition		
Patient Retention		
Treatment Mix		
Operational Efficiency		
Team Utilisation		

Worksheet 3: Business Performance

Track the metrics that matter and link performance data to action.

Key Formulas

Revenue per Patient = Total Revenue / Number of Patients Seen

Treatment Acceptance Rate (%) = Accepted Treatment Value / Proposed Treatment Value x 100

Recall Effectiveness (%) = Patients Booked from Recall / Patients Due for Recall x 100

Total Revenue	Number of Patients Seen	Revenue per Patient

Accepted Treatment Value	Proposed Treatment Value	Treatment Acceptance Rate (%)

Patients Booked from Recall	Patients Due for Recall	Recall Effectiveness (%)

Metric	Current Value	Target	Target Date
Revenue			
New Patients			
Chair Utilisation			
Treatment Acceptance Rate (%)			