

# PRACTICE PLANNING

**A JRA Worksheet for Evaluating and Strengthening  
Your Healthcare Practice**



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# INTRODUCTION

Running a dental practice requires balancing several roles—clinician, leader, mentor, and business owner. Sustainable success comes from clear priorities, strong systems, and regular review of the factors that drive growth and long-term value.

This worksheet helps you evaluate the key areas that influence performance, identify opportunities for improvement, and define practical next steps. Use it throughout the year to align your team, track progress, and prepare for the next stage of your professional journey.

JRA Healthcare provides real estate advisory, transition planning, and strategic guidance that help practices operate efficiently, grow sustainably, and build lasting value.

## DAILY PRACTICE CHECK-IN

Quick Tip: Begin each day with clarity.

Top 3 priorities for today		Status
		TO DO <input type="checkbox"/> IN PROGRESS <input type="checkbox"/> DONE <input type="checkbox"/>
Yesterday's wins		
Team focus or training topic	Patient experience focus	
Notes / follow-up items		

# BILLING & ACCOUNTS RECEIVABLE

Quick Tip: Review accounts receivable monthly and address balances older than 45 days.

TOTAL ACCOUNTS RECEIVABLE	BALANCES MORE THAN 30-45 DAYS PAST DUE
<hr/> <hr/>	<hr/> <hr/>
HOW OFTEN ARE A/R REPORTS REVIEWED AND BY WHOM?	
<hr/> <hr/> <hr/>	
ARE WRITE-OFFS DOCUMENTED AND JUSTIFIED?	
<hr/> <hr/>	
WHERE CAN BILLING PROCESSES IMPROVE?	
<hr/> <hr/> <hr/>	

## DAILY PRACTICE CHECK-IN

Quick Tip: Standardize treatment presentation.

Current acceptance rates:

Hygiene: \_\_\_\_\_ Restorative: \_\_\_\_\_ Preventive: \_\_\_\_\_

Who presents treatment plans? \_\_\_\_\_

When is the financial discussion introduced? \_\_\_\_\_

How could communication improve case acceptance? \_\_\_\_\_

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# DAILY PRACTICE CHECK-IN

Quick Tip: Most patient lifetime value occurs in the first 18 months.

How often does your schedule run behind? \_\_\_\_\_

What services could improve the patient experience? \_\_\_\_\_

How many patient referrals or reviews do you receive monthly? \_\_\_\_\_

How could the experience improve? \_\_\_\_\_

Referral goal \_\_\_\_\_

Review goal \_\_\_\_\_

## MARKETING

Quick Tip: Track patient acquisition cost and focus on high-quality patients.

Estimated patient acquisition cost: \_\_\_\_\_

Marketing budget: \_\_\_\_\_

Most effective strategies: \_\_\_\_\_

Website evaluation: \_\_\_\_\_

## OPERATIONS

Quick Tip: Review overhead regularly and identify missed production.

Membership plan effectiveness: \_\_\_\_\_

How often is insurance verified? \_\_\_\_\_

Overhead percentage: \_\_\_\_\_

Where could efficiency improve? \_\_\_\_\_

## REAL ESTATE

Quick Tip: Begin lease renewal planning 12-18 months before expiration.

Does your location support long-term goals? \_\_\_\_\_

Needed upgrades or renovations? \_\_\_\_\_

Key lease clauses or deadlines: \_\_\_\_\_

\_\_\_\_\_

## TEAM

Quick Tip: Focus on the highest-value work and delegate the rest.

Your primary role in the practice? \_\_\_\_\_

Responsibilities that could be delegated: \_\_\_\_\_

\_\_\_\_\_

Hiring or culture improvements: \_\_\_\_\_

\_\_\_\_\_

## TRANSITION PLANNING

Quick Tip: Begin planning 3-5 years before retirement or sale.

Years remaining in practice: \_\_\_\_\_

Financial readiness for retirement? \_\_\_\_\_

Transition options being considered? \_\_\_\_\_

## ACTION PLAN

Top priorities for the next 90 days

1

2

3



## HOW JRA HELPS:

- 1 Ownership-path strategy and transition planning.
- 2 Buy-side advisory, including deal flow, underwriting, and lender-ready packages.
- 3 Start-up advisory: site selection, lease negotiation, and budget planning.
- 4 Real estate strategy: renewals, relocations, and purchase-vs-lease analysis.
- 5 Operations support: case acceptance, hygiene capacity, marketing, and systems that enable long-term success.
- 6 A structured four-phase consulting process—from launch through scale.

Let our team help you align your real estate with your long-term vision.

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