

1 HOUR KPI & ROI PLAN

	<u>Action Items to Complete</u>	<u>Who</u>	<u>Due Date</u>	<u>Status</u>
1	Complete Revenue Planning Worksheet			
2	Complete Marketing ROI Form			
3	Run profit and loss for last year - detailed with % of Inc			
4	Identify the marketing vendors by name			
5	Look at average spend per month			
6	Run a report of your monthly sales			
7	Figure out your average monthly revenue			
8	Identify how many appointments you need per week by profit center to make facility sales goals			
9	Take that number and double it to calculate number of consults needed per week			
	How are you doing? Over or Under			
10	Take the number consults needs times 4 to calculate desired number of leads per week.			
11	Calculate from these your KPI's for the following:			
12	How many leads per month do you need?			
13	How many consultations per month do you need?			
14	What is your current closing ratio?			
15	What is your current phone conversion ratio?			
16	How many leads are coming in through each lead source?			
17	Patient referrals?			
18	On line: website, email, ppc, social paid adv			
19	Are you getting a 4X ROI on marketing dollars spent?			
20	Set up or review your tracking for call conversion monthly			
21	Set up or review your reporting for closing ratios monthly			
22	Review monthly lead reports for all lead sources			
23	Calculate cost per lead and ROI for all lead sources			
24	Research changing marketing per your results			
25	Set up group bonus structure after setting monthly goals			
26	Train staff with the consultation protocol			
27	Utilize your Weekly Revenue Tracker			
28	Clean up your e-mailing list			
29	Sub-divide your list and make it segmented			
30	E-mail weekly according to plan			
31	Implement Facebook contest of the month			
32	Utilize the entries as a lead source			
33	Specify sales event months and services			
34	Pull your lead tracking reports - weekly			
35	Set up tracking for call conversion - weekly			
36	Set up reporting for closing ratios - weekly			
37	Review monthly lead reports for all lead sources			
38	Calculate cost per lead and ROI for all lead sources			
39	Research changing marketing per your results			
40	Set up group bonus structure after setting monthly goals			
41	Train staff with the consultation protocol			
42	Look at labor saving options			
43	Review compensation plans for each staff member			
44	Create the three main goals for the year			
45	Set up quarterly and monthly steps to meet your goals			
	PROVEN SYSTEMS CREATE PROVEN RESULTS!			