

DSO STRATEGY PLAYBOOK

ARE YOU BUILDING YOUR FUTURE OR SOMEONE ELSE'S?

Use this scorecard to objectively evaluate your current DSO experience, your trajectory toward ownership, and where you need to focus. Score each metric **GREEN (3 points)**, **YELLOW (2 points)**, or **RED (1 point)**.

Metric	GREEN (3 points) You're on Track	YELLOW (2 points) Needs Attention	RED (1 point) High Risk	Your Score (1-3)
 Monthly Production How much clinical production you generate.	\$70,000+ You are fully utilized and producing at a high level.	\$50,000 – \$70,000 Room to grow production and efficiency.	<\$50,000 Underutilized or limited opportunity.	_____
 Income Your annual pre-tax compensation.	\$225,000+ Compensation reflects your production and value.	\$175,000 – \$225,000 Competitive, but could be stronger.	<\$175,000 Below market or not rewarded for production.	_____
 Hygiene Flow Average hygiene patients you see per day.	10 – 12 / day Strong hygiene system creates consistent opportunities.	7 – 9 / day Decent flow, but could be stronger and more consistent.	<7 / day Weak hygiene flow limits your production potential.	_____
 New Patients Quality and consistency of new patient flow.	Strong Consistent, robust flow of new patients each month.	Moderate Some months strong, others inconsistent.	Weak Unpredictable or minimal new patient flow.	_____
 Savings How much you are saving and investing annually.	\$25,000+ / year Excellent savings positioning you for ownership.	\$10,000+ / year Building savings, but could be more.	< \$10,000 / year Limited savings slows your path to ownership.	_____
 Leadership Exposure Opportunities to lead teams or projects.	High Leading people, projects, or initiatives regularly.	Moderate Some opportunities, but not consistent.	None No leadership responsibility or growth opportunities.	_____
 Business Training Access to business education and mentorship.	Significant Regular training in finance, operations, leadership, or strategy.	Limited Some training, but not structured or consistent.	None No business training or mentorship.	_____
 Ownership Timeline Your target timeline to own a practice.	< 24 months Clear plan and actively working toward ownership.	2 – 5 years Have a plan, but not executing at full speed.	Undefined No clear plan or timeline for ownership.	_____
 Noncompete Restrictiveness of your noncompete agreement.	Fair ≤10 miles and/or ≤1 year. Allows realistic options.	Restrictive >10 miles or 1–2 years. Limits some options.	Severe >25 miles and/or >2 years. Limits future choices significantly.	_____

YOUR TOTAL SCORE

23 – 27 POINTS

ON TRACK

You're building momentum and using the DSO as a launchpad to ownership. Keep executing!

15 – 22 POINTS

AT RISK

You have some strengths, but key areas need attention. Create a plan and take action.

9 – 14 POINTS

OFF TRACK

You're likely stuck on the treadmill. Major changes are needed to secure your future.

HOW TO USE THIS SCORECARD

1. Score yourself honestly (1-3) for each metric.
2. Add up your total (max 27 points).
3. Review your weak areas (yellow/red).
4. Create an action plan (see below).
5. Re-score every 3-6 months to track progress.

YOUR ACTION PLAN: WHERE YOU NEED WORK



1. IDENTIFY YOUR RED/YELLOW AREAS

- Which metrics are holding you back?
- What's within your control to improve?



2. SET SMART GOALS

- Specific: What will you do?
- Measurable: How will you measure it?
- Time-bound: By when?



3. TAKE ACTION

- Increase production
- Improve systems
- Seek mentorship
- Prepare financially



4. BUILD YOUR SKILLSET

- Clinical excellence
- Communication
- Leadership
- Business acumen



5. REVIEW & ADJUST REGULARLY

- Re-score every 3-6 months
- Celebrate progress
- Stay committed to your ownership goal



REMEMBER:

The DSO can be a bridge to ownership—or a trap. This scorecard helps you make sure every day moves you closer to building YOUR legacy, not someone else's.



**OWN YOUR FUTURE.
BUILD YOUR LEGACY.**



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