

PRACTICE EVALUATION WORKSHEET

USE THIS WORKSHEET TO EVALUATE THE KEY FACTORS THAT INFLUENCE YOUR PRACTICE'S VALUE.

Score your practice against the model benchmark to identify strengths, opportunities, and areas for improvement.

PRACTICE VALUE METRICS		MODEL PRACTICE (IDEAL)	RATE YOUR PRACTICE
	Gross Revenue	10	___ /10
	Net Profit	10	___ /10
	Location	10	___ /10
	Office Appearance	10	___ /10
	Size of Patient Base	10	___ /10
	Equipment	5	___ /5
	New Patients	5	___ /5
	Accounts Receivable	5	___ /5
	Treatment Provided	5	___ /5
	Staff Retention	5	___ /5
	Computer/Tech	5	___ /5
	Insurance Breakdown	5	___ /5
	OSHA/HIPAA Compliance	5	___ /5
	Transferability	5	___ /5
	# of Operatories (6+ operatories = score of 5/5)	5	___ /5
TOTAL		100	___ /100

SCORING GUIDE

90-100

Exceptional practice with premium valuation potential.

80-89

Strong practice with a few opportunities to increase value.

70-79

Solid foundation but several areas deserve attention before selling.

BELOW 70

Significant value may be left on the table. Focus on operational improvements before taking the practice to market.



CEO INSIGHT

- +5% hygiene reactivation → +10% production
- -3% supply overhead → +\$30,000 annual cash flow
- +1 new service per year → +\$100,000 average revenue lift
- +1% improved case acceptance → thousands in retained value

Growth isn't necessarily about adding more; it comes from optimizing systems already in place.