

STAFF | SYSTEMS | SERVICES

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KEY QUESTIONNAIRE



**1. What is your Mission and Vision for your company?**

Mission:

Vision:

**2. What are your company's Core Values?**

**3. Describe your current services or products.**

| <b>SERVICES</b> | <b>PRODUCTS</b> |
|-----------------|-----------------|
| 1.              | 1.              |
| 2.              | 2.              |
| 3.              | 3.              |
| 4.              | 4.              |
| 5.              | 5.              |
| 6.              | 6.              |
| 7.              | 7.              |
| 8.              | 8.              |
| 9.              | 9.              |
| 10.             | 10.             |



**4. Why are you are in business?**

**5. What do you believe you are selling?**

**6. How are you selling it?**

**7. What does “success” look like to you personally?**



**8. What do you think has to happen for this company to be successful?**

**9. What is your revenue target for your business, services, or products for the coming year?**

- 1.
- 2.
- 3.
- 4.
- 5.

**10. How might your current team need to change to reach your goals?**

- 1.
- 2.
- 3.
- 4.
- 5.



**11. What are the holes in your business where processes or systems are breaking down or aren't working as well as you would like?**

|     |
|-----|
| 1.  |
| 2.  |
| 3.  |
| 4.  |
| 5.  |
| 6.  |
| 7.  |
| 8.  |
| 9.  |
| 10. |

**12. Do you feel you have well-defined your clinic culture in a way that current or future staff will be able to learn, follow, and live by?**

Yes  No

**13. How many patient emails do you have to start marketing to? \_\_\_\_\_**

**14. If you have social media, how many followers do you have? \_\_\_\_\_**

**15. Do you have texting capabilities to your patients? Yes  No**

**16. How many new patients per month do you get on average? \_\_\_\_\_**

**17. What percentage of your patients do you convert to cash-pay services? \_\_\_\_\_**





*The most difficult thing in life is  
to know yourself.*

– Thales –

