

BUSINESS AUDIT QUESTIONNAIRE

Practice Mastery Solutions for an
Evolutionary Practice



PART OF THE PRACTICE MASTERY PROGRAM

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*What lies behind us, and what lies before us
are tiny matters compared to
what lies within us.*

Ralph Waldo Emerson



***The great gift of the human imagination is
that it has no limits or ending.***

Jim Rohn



BUSINESS AUDIT QUESTIONNAIRE

PRACTICE MASTERY SOLUTIONS FOR AN EVOLUTIONARY PRACTICE

THE QUESTIONNAIRE AS A CATALYST

Welcome to the Business Audit Questionnaire. This is an abridged version of the 150+ page comprehensive, Business Transformational Questionnaire that comes with the *Practice Mastery* Program.

I want to give this questionnaire to you for FREE because I want you to see the opportunities that exist in your business, I want you to know the untapped potential, and I trust through doing this process you will see the level and depth of questions that we address in the *Practice Mastery* Program. I want you to understand that there is a system that can create as a reality, your most compelling dreams and desires, and I want to share the opportunity of being part of that system with you.

After completing this questionnaire you may sense there are things you don't know, don't do or results that you are not achieving that you want to be achieving.

This could mean to you: more money, more clients, greater satisfaction, enhanced client results and outcomes, and feelings of success and fulfilment.

The *Practice Mastery* Program was created for the single purpose of creating those outcomes for the most important people in the world... you and your clients.

I invite you to complete this questionnaire to get a sense of whether you have all that you truly desire and all that you really deserve from your practice. If not, contact us immediately at **www.practicemastery.com.au** (info@practicemastery.com.au) and secure your place in the *Practice Mastery* Program, and transform your life and your business today!

Let's get started.

THE QUESTIONNAIRE AS A CATALYST

BEHOLD THE VISION

What is the vision you have for you, for your business, practice or organisation and for your clients when it is complete?

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What is your business mission and vision? How is it communicated? What will the practice look like? Where will it be, who will you employ, what type of client does the practice serve? Get clear, get specific, let your imagination fly...

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Do you have a plan for the creation of this ideal business?

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Do you have a timeline and sequence of events as part of that plan?

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Why are you in business and what purpose does it serve?

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PUTTING THINGS IN PERSPECTIVE

Rate from 0–10 the level of happiness and satisfaction you experience with the following key areas of your business, with 0 being complete and utter dissatisfaction, discontent and disillusionment and 10 being complete and unequivocal satisfaction, pleasure and fulfilment:

How happy are you with your client volume (i.e. the total number of clients you see)?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with your client visit frequency (i.e. the total number of times a client returns for care)?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with your clients' compliance to your care programs (i.e. their consistency and commitment to the care you prescribe)?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with your consultation fees (i.e. the amount you charge per client visit)?
How happy are you with your practice hours and how much you work?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with the relationship that you have with your clients (is it fulfilling, empowering and satisfying? Do you meet each other's needs)?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with the type of care you provide (are you satisfied with the care you deliver and how you deliver it)?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with your practice or clinic?

0	1	2	3	4	5	6	7	8	9	10
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How happy are you with your level of success and your achievements in the practice?

0	1	2	3	4	5	6	7	8	9	10
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KNOWING ME, KNOWING YOU... AAH

What first got you started in the practice? Why were you drawn to the Health and Wellness industry?

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What is your greatest goal for your practice?

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What is your greatest goal for your clients?

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Do you feel the rewards outweigh the worries... that the benefits compensate for the difficulties? If not, why not?

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GETTING TO KNOW YOUR CORPORATE IDENTITY

What is the vision for your business in regards to client numbers, new client numbers, turnover, profit, number of staff etc. for the next:

6 months?

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1 year?

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3-5 years?

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10 years?

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In great clarity and vivid detail describe what your business does.

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TABLE 1: FINANCIAL AUDIT:

For each of the last five years you have been in practice, list the following figures:

	Year To Date	Last Year	2 Years Ago	3 Years Ago	4 Years Ago	5 Years Ago
Practice Income (turnover)						
Total Express (Net Profit)						

Are you satisfied with those figures? If not, why not?

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Do you see any trends? How do you explain those trends?

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FINANCIAL PERFORMANCE

Does the business experience periods of unpredictable or unsustainable cash flow? Does it sometimes struggle to meet its financial commitments?

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Does the business undertake forecast budgeting and monitor those budgets? If not, why not?

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Does your business fall into this category: the turnover is fine, but actual profit isn't what I would like it to be? Explain why it isn't.

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FITTING THE PIECES

PART 1: THE ORGANISATIONAL STRUCTURE

Do the employees or contractors have job descriptions, defined roles and responsibilities for each of their roles? If not, why not?

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Do they have clearly-communicated expectations, targets and Key Performance Indicators? If not, why not?

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PRACTICE DATABASE AND CLIENT PROFILES

What type of a database does the business operate: electronic or manual? Is it part of a CRM?

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Specifically, what kind of data does the business record on its database?

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What client demographic occupies most of your time in practice (i.e. what is the demographic or typical client you personally treat the most)?

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How many of the current clients are what you would consider to be 'dream' clients – your ideal clients that you would like to work with all of the time?

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PRACTICE OPERATIONS

Do you consistently run on time with clients or do you frequently run late? If so, how late? What impact does running late have on the business, the staff and the clients?

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Are clients booked in clusters and by consultation type (i.e. clients booked closer together, not allowing for spacing; new clients in one block, repeat clients in another; education clients at another time etc.)?

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Are clients called prior to their consultation as part of a reminder system?

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Are clients given a detailed program outlining their consultation times and the date of those consultations as well as a detailed explanation of what is expected from them?

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What percentage of the business's scheduled clients fail to keep their appointments?

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What percentage of cancellations do you get per week? Do they reschedule?

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Do clients frequently not complete their recommended care programs? If not, why not?

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YOUR HEALTHCARE PROCEDURES

Does the practice incorporate client education into their care plans in a systemised and professional way?
If yes, how do clients respond to this?

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Does the business have a specific consultative format designed to elicit key information from a pre-screening procedure, a history, an examination and a diagnostic or assessment process?

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What subjective assessment procedures are used to determine the client's specific and required needs and desires?

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What objective assessment procedures are used to determine the underlying causes and mechanisms contributing to the causal presentation of the client?

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Is there a defined protocol to ensure you have addressed the deeper needs of the client in the enquiry process as well as ascertained sufficient understanding of the cause and mechanism of the presenting complaint?

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Is there a system to plan and strategise powerful and effective health-care programs specific to your clients' needs and focused on producing the outcomes they seek and desire?

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MANAGEMENT

Does the manager monitor the Key Performance Indicators (KPIs), report on these and follow through with strategies to improve results? How?

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Does the manager establish projects for team members to define and track the progress on the outcomes and results that the team wants, and support the realisation and outcome of those projects?

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RECRUITMENT AND TRAINING

Does your practice have a formal recruitment and training program? If not, how do you ensure your staff are suitable and well-trained for their positions?

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Do staff perform at their peak; are they profitable, productive and always professional? If not, why not?

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Are staff trained exactly how to do their job and advised what is expected of them?

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ADMINISTRATION, RECEPTION AND ASSISTANTS

Does your reception staff understand and communicate with confidence the principles and practices of natural therapies?

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Do they have a thorough understanding of all products and services?

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Do they have a protocol to handle client enquiries; to welcome and attend to clients and their needs?

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Do they have specific systems, protocols to follow and scripts to use?

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YOUR PRODUCT OR SERVICE

What are the key benefits, results, outcomes or advantages your products or services provide to your client?

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SERVICE

Is there a service training program for the business and team members? What type of training is offered?

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MARKETING

What is your biggest current unmet marketing goal?

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What does it cost you to get a new client? Eg: if you spend \$100 on an advertisement and it attracts five clients; your clients' cost would be \$20.

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What is your target market and how did you arrive at it?

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Do you have a marketing budget? Is it based on results or some other variable?

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Do you record client testimonials?

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Do you have a specific system to actively obtain referrals?

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Do you have a lapsed client reactivation program?

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What has been your biggest marketing success to date (defined as a specific promotion, advertising campaign, health or spinal screenings, scripts etc.)?

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Are you still using it or a version of it?

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Who is responsible for public relations in your business?.....
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How often are you communicating with your clients? Through which medium?
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SALES REPORT AND PROCEDURES

What is the average amount a client spends per consultation with you personally? With the business (assuming there is more than one practitioner)?
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What is your client visit average? Eg: how many times do you see your average client per year?
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What is your client dollar average? Eg:. how much does your average client spend with you per year?
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What is the client's lifecycle and expectancy? Eg: how long is the average client likely to stay with the business before moving on? 3 months, 6 months, 1 year... for life?
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What is the average profit generated from a new client?
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What is the 'lifetime value' of your typical client? Eg: how much revenue will he/she generate for you over the entire period he/she does business with your business?
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What do you feel are the top three reasons why a potential client will not commit to care or will not schedule their first appointment?

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What number of clients schedule an appointment with your practice upon calling to enquire about making a consultation? What is your conversion rate from an enquiry to a consultation?

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What types of results or benefits can the client expect from care or service at the practice?

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Do they frequently get these results or benefits? If not, why not?

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OPPORTUNITIES

What non-competing businesses sell complimentary products/services to what you offer does your business have relationships with? Eg: do you or the business actively liaise and network with a health food store or gym etc?

What additional value can be brought to the clients; what promises can be made; what advantages can be provided; what introductory offers can be created etc., that are not being made now?

SELF-ANALYSIS, MARKETING-ANALYSIS AND COMPETATIVE ADVANTAGE

What are your personal strengths and assets?

What are the business's strengths and assets?

What resources (technology, specific knowledge, people, capital/money, location, available time, networks or connections, goodwill etc.) does the business have that could be leveraged to optimise results or performance?

What unique elements exist or operate in the business or your practice? Eg: skills, philosophy, techniques or technology, results or service delivery.

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DESCRIBE IN DETAIL THE COMPETITION IN YOUR LOCAL AREA.

What services do they provide?

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What products do they sell?

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Do they have a web presence?

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What are their fees?

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How busy are they?

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What type of results do they traditionally achieve?

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How are they perceived in the market place?

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Why would someone choose your business over your competitors?

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Why do people leave your business to see your competitors? (Be honest with yourself.)

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UNIQUE SELLING PROPOSITION - USP

What makes your product or service irresistible to a client?

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What do your clients really want? (Be specific, don't just answer 'a quality product or Service') How do you know what they want?

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More things to think about...

ADAPTABILITY

Do you find it easy to change things in your personal life, or do you generally prefer things to remain as they are?

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TEAM BUILDING

Does the business operate as a high-trust unit? What do you do to ensure that your staff and clients trust the business?

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Does the team operate in a united and synergistic way? If not, why not?

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What characteristics would you like to see in your staff?

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Do you display the characteristics you would like to see in others?

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What time do you spend actively dreaming, designing and creating a unique and compelling future for you, your clients, your practice and your life? What are the results?

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Does the business have a web site?

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Does that web site have a sales page?

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Does the web site have saleable products or is it information-based?
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Does the web site catch names for a database?
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Is that database used to communicate or market through e-mail or on-line?
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HOW DOES PRACTICE MASTERY FIT IN?

The table on pages 21 - 25 addresses any weaknesses or insufficiencies that have been highlighted as a result of your completing the questionnaire and lists how the *Practice Mastery* Program addresses those weaknesses. Furthermore, the *Practice Mastery* Program can maximise the opportunities inherent in the strengths that shone through and can take your business to the next level. Let's see how...

Category of influence within the business	What you can experience if this area of business is not working	Which Practice Mastery materials provide the solution	Methodology of impact of the Practice Mastery Program that brings about your desired change (i.e. how and why it works)	The change and benefits you can expect
Behold the vision	No clear or defining direction or philosophy for practice.	Introductory materials	The program helps you define your vision and personal, business and practice philosophy, creating the basis for a powerful practice methodology.	Clarity, direction, purpose and focus
Putting things in perspective	A level of dissatisfaction and discontent. Excuses for lack of success.	Introductory materials	The program identifies the stark reality of the insufficiencies that exist and starts to germinate the path to what you want to create.	Clarity, direction, purpose and focus
Knowing me, knowing you... aah	You may be unclear about your role, the meaning behind the care you provide to your clients and what you actually can do.	Introductory materials	The program walks you through step-by-step, helping define your philosophy, beliefs, values and how to apply them in practice.	Clarity, direction, purpose and focus

How things began and how they have changed	Not recognising what changes have already occurred and how to create momentum with positive and progressive change.	Introductory Materials	The program brings you to a sense of recognition of what changes have occurred and what this means to you.	Seeing what change has happened helps you to embrace and create more change in moving forward.
Getting to know your corporate identity	Not having a distinct and clear understanding of the different roles of the Technician, the Manager and the Entrepreneur.	Introductory Materials	This program will highlight some brutal realities, providing the impetus for positive and progressive change.	Clarity, direction, purpose and focus for the business and those who work there.
Your practice profile	The complete lack of important measurements and what they imply.	Introductory Materials	Through the 10 PC you will create an awareness of what is needed to move forward and strategies to achieve that progress.	Accurate, useable and valuable information that tells you how your business is going.
Financial performance	Where the money is really going and what value the money really has on those areas.	Introductory Materials	You will be able to create an awareness of, and the strategies for, improving the finances of the business.	Accurate, useable and valuable information that tells you how your business is going.
Fitting the pieces together (organisational structuring)	Ambiguity of roles and responsibilities resulting in underperforming staff and team conflict.	Bonus material	This section of the program provides clear and specific documentation to detail roles, responsibilities and expectations, removing the potential for conflict.	Greater staff retention and selection of better staff members as well as increased productivity and performance.
Practice database and client profiles	Inaccurate and inappropriate information on clients.	Phase 1	By gaining more accurate and useable information on clients you are better positioned to market effectively to them and meet their specific needs.	Increased client numbers, client retention as well as client satisfaction

Unique Selling Proposition – USP	You have no distinction, no clear advantage or reason for a client to choose you amongst the competition.	Reference material	By creating a distinctive and unique message that communicates what you do and how you meet the clients' needs, you can position yourself preferentially in the minds of your clients.	You become the practitioner or clinic of choice first time, every time.
Change	You have stagnated, become stuck, have not grown and are disheartened and frustrated.	Reference material	By embracing change you allow yourself the opportunity to grow to your fullest potential.	Fulfilment of your potential.
Team building	Poor unity, cohesion or camaraderie within the team; conflicts and laziness.	Reference material	By designing and implementing a team-building program, you create the unity a business needs to succeed.	Balance, harmony, fun and success.
Leadership and character	No direction or clarity, frustration at lack of performance or staff commitment and responsibility.	Reference material	By becoming clearer on your leadership role and embracing that role, you can direct your business and the team to the creation of the vision for the business.	Ultimate success and fulfilment.
Success	Not having all of your basic and deeper needs met, feeling dispirited, unfulfilled, frustrated and in financial need.	Reference material	By developing the attitude, character and skills necessary, you can become as successful as you choose.	Ultimate success and fulfilment and the opportunity to be truly significant.
eCommerce	Less referrals, product sales, exposure and opportunity to educate the world than you might otherwise have.	Reference material	By using the internet and the web you can touch more lives, sell more products, communicate more, often building the business at a greatly accelerated rate.	Increased client numbers, increased client retention, more money, as well as the opportunity to share the health and wellness message with the world!

Practice operations	Your business might be disorganised, even chaotic and certainly not performing as efficiently and effectively as it might.	Phase 2,4, 7, 8 and 9	By communicating expectations, requirements and most importantly the 'reason why' to your clients, you create a success system and things are done the way they need to be done to achieve the results you desire.	Efficiency, effectiveness and productivity in a systemised and predictable way.
Your health-care procedures	The client may have a lack of real time understanding of what you do and why you do it, reducing the impact of your care and the message you provide; compliance and longevity of care is also reduced as well as the exposure your business might otherwise be achieving with an effective system to support your health care procedures.	Phase 3, 4, 5, 6, 7, and 8	By understanding client needs, communicating that you understand these needs and exposing information that represents this knowledge, you build a business that is well received.	You are truly respected and revered by your clients and recognised in the industry as a leader.
Management	Lack of organisation, discipline and results... and you may be too busy to be living a balanced or fulfilled life.	Reference material	By understanding the role of the manager and putting in place strategies to actually manage (not abdicate) success, freedom can be yours.	More time, more effective outcomes and a better organised operation.
Recruitment and training	Staff that under-perform, that do not do what is expected or required, do not follow instruction and contribute; high turnover of staff.	Bonus material	By creating a recruitment, induction and training program you provide a system to successfully create an integrated and synergistic team.	Balance, harmony, fun and success... it's as simple as that!
Administration, reception and assistants	A support team that does not work efficiently, effectively or is integrated into the business, costing you time, money and heartache.	Bonus material	By effectively recruiting and training, you provide a system to successfully create an integrated and synergistic team.	Balance, harmony, fun and success... it's as simple as that!

You and the business product or service and the service provided	Poor client service undermining your relationship with the client and their potential to benefit at the highest possible level.	Phases 1 - 10	By identifying how service works, how to apply it in a systematic way to reproduce excellence on a consistent basis, you make major inroads on client rapport and build a lasting and powerful relationship.	Lifetime quality care for clients – who stay!
Marketing	Not enough new and, repeat clients.	Phase 2, 3 and 4	The <i>Practice Mastery</i> Program offers you a complete formula of scripts, procedures and support documentation to maximise the marketing opportunity inherent in client care, as well as a powerful practice-building strategy.	Expectancy of results and commitment to care.
Sales report and procedures	Decreased profitability and reduced client numbers, making the business potentially unsustainable.	Phase 4, 5, 8, 9 and 10	By learning ethical sales techniques and incorporating those into practice you become more profitable, you see more clients and you, as a business, become increasingly more valuable.	More clients, more money and greater satisfaction.
Client satisfaction and outcomes	Spirited clients; clients who leave the practice or mope into the clinic.	Phases 1 -10	By discovering the client's deeper needs, addressing them, serving them and fulfilling their needs beyond their expectations you become more than a clinic to them, you become a special friend and change the way they see health care as well as their life!	Revered and enthusiastic clients who champion your business and love what you do... everything!
Opportunities	Not being the most preferentially sought-after clinic or practitioner in the area.	Reference material	When you recognise what standards need to be met and exceeded in the industry you can position yourself, using the <i>Practice Mastery</i> Program, as the industry leader.	Being the most sought after clinic or practitioner in your area... and beyond!
Self analysis, marketing analysis and competitive advantage	Problems with technology, staff, finances, clients, results.	Reference material	By recognising where the obstacles to your success are you can begin to overcome those limitations and achieve the success and results you truly deserve.	Become increasingly competitive and begin the growth and development of your business and success model.

CONCLUSION

Congratulations!

By completing this basic questionnaire, you have placed yourself ahead of 90% of the business owners in the world today who never take the time to think deeply about and truly focus on the meaning and direction of their business. Most people spend all of their time working *in* their businesses, not *on* their businesses, and never experience the reward that having a business enterprise has to offer.

If you would like to take part in the *Practice Mastery Program* and experience the ultimate in your practice, check out the website at **www.practicemastery.com.au** or contact us at **info@practicemastery.com.au** to become part of the leadership group made up of people that are transforming their practices, their lives and their clients one step at a time.

E-mail now or visit our web site at www.practicemastery.com.au for your jump-start into practice success!

And remember our guarantee...

1. Practice Mastery's guaranteed results.

If, in your first year using our *Practice Mastery* system, you are not seeing 15% more new clients, and if they are not returning 15% more often than prior to the program being implemented, we guarantee to refund your money 100% - no questions asked!

2. Practice Mastery's 'show me the money' challenge and guarantee.

Practice Mastery unequivocally accepts the challenge of making you more money in your practice. We guarantee that if you follow our recommendations, implement the *Practice Mastery* System and do not make an extra five times the program fee in profits in your first year using our *Practice Mastery Program*... the program is yours FREE! We will refund the whole course fee, no 'ifs', no 'buts' and no questions asked. Make more money or don't pay. It's as simple as that.

We look forward to hearing from you soon.

Marcus Chacos and the *Practice Mastery* Team

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Transforming **your** health care practice **your way**

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