

# Practice Financial Health & Growth Tracker

Practitioner Name: \_\_\_\_\_ Review Period (Month/Quarter): \_\_\_\_\_

This tool is designed for the Functional Medicine Practitioner to transition from "hourly burnout" to a sustainable, high-value practice model. Use this monthly to monitor your "Golden Ratio" and optimize your revenue streams.

## Section 1: The Golden Ratio (LTV & CAC)

*Calculate if your marketing effort is yielding a sustainable return.*

**A. Customer Acquisition Cost (CAC)** 1. Total Marketing/Ad Spend this period: \$\_\_ 2. **Total hours spent on Discovery Calls/Networking:** \_ hrs x (Your Hourly Rate: \$\_\_\_) = \$\_\_\_ 3.

Total New Clients Acquired: \_\_\_\_\_ 4. **CAC (Total Costs [1+2] ÷ New Clients [3]):** \$\_\_\_\_\_

**B. Patient Lifetime Value (LTV)** 1. Average Revenue per Patient (Monthly): \$\_\_ 2. **Average Retention (Number of months a client stays):** \_ 3. **LTV (Monthly Revenue [1] x Retention [2]):** \$\_\_\_\_\_

**C. The Ratio Assessment - [ ] LTV : CAC Ratio (LTV ÷ CAC):** \_\_\_\_\_ : 1 (*Target: 3:1 or higher. If lower, consider increasing package prices or reducing acquisition time.*)

## Section 2: Revenue Stream & Margin Analysis

*Categorize your income to ensure you aren't "hollowed out" by lab costs.*

Revenue Stream	Total Revenue	Direct Cost (COGS)	Net Margin %	Strategic Goal
Clinical Services	\$	\$0 (Usually)	_____ %	Target: 80-90%
Functional Labs	\$	\$	_____ %	Target: 15-30%
Nutraceuticals	\$	\$	_____ %	Target: 35-50%
Group Programs	\$	\$	_____ %	Target: 90%+

## Section 3: Target Phase Protocol Budgeting

*Use this to design tiers for complex protocols to prevent client "sticker shock."*

Tier Level	Included Services/Labs	Total Client Cost	Practitioner Profit
Essential		\$	\$
Advanced		\$	\$
Comprehensive		\$	\$

## Section 4: Cash Flow & Sustainability Reflection

Current Cash Reserve (Target: 3 months expenses): \$\_\_\_\_

**Observations & Improvements:** - Is my Lab Margin being tracked separately from my service fees? [ ] Yes [ ] No - Which revenue stream is currently the most "passive" or high-margin? \_\_\_\_\_ - What is one way I can increase my LTV this month (e.g., adding a "Sustain" membership)?

---

### Next Steps for Revenue Optimization:

1. \_\_\_\_\_
  2. \_\_\_\_\_
- 

*AccrediPro Standards Institute Certified Tool*

---