Marketing Scorecard + KPI Tracker

Practices don't realize how much opportunity they're leaving behind until they see the numbers. SMC's free Marketing Scorecard + KPI Tracker reveals the truth about your performance and helps you make smarter, faster growth decisions.

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Marketing Scorecard + KPI Tracker

See what's really working in your marketing, identify weak spots, and make data-driven decisions to grow your practice.

Download Your Scorecard

Step-by-Step Instructions

One-Time Setup (10 minutes)

1. **Make Your Copy** – Save the file and rename it with your practice name and current year.

2. **Open "Start Here"** – Review the overview, then move to your current quarter tab (ex: "Q4 2025").

3. **Enter Monthly Goals** – Add your monthly new patient and production goals in the Goal column.

4. **Align Definitions** – Make sure everyone agrees on what counts as a lead, new patient, and production.

5. **Decide Your Routine** – Plan to update the scorecard weekly. Consistency makes the data accurate.

Weekly Update (15 minutes)

Each week, record your metrics in the current quarter tab:

Website

- Visitors (GA4)
- Search Impressions, Clicks, CTR (Search Console)

Social Media

- Impressions
- Link Clicks
- Followers/Subscribers

Google Ads

- Impressions
- Clicks
- Leads (new patient intent only)
- Spend

Per Location

- New Patient Phone Leads (call tracking)
- New Patients (from PMS)
- New Patient Production (from PMS)

Other Metrics

- Reviews Added
- Online Bookings (LocalMed/NexHealth)
- Internal Referrals

Pro Tip: Update on the same day each week (ex: every Monday morning).

Monthly Review (20–30 minutes)

1. **Complete the last week's data** in the quarter tab.

2. **Review the "Monthly Reporting" tab** for totals and benchmarks.

3. **Check your dashboards** for trends in leads, calls, and production.

4. **Identify your top 3 insights:**
    - What improved
    - What declined
    - What action to take next month

Troubleshooting

- High leads, low patients → tighten conversion tracking.
- Lots of calls, few bookings → train front desk on scripts.
- High cancellations → improve confirmations or financing options.

Quick Weekly Huddle

Ask your team:

1. What changed in leads, new patients, or production?
2. Where are we losing patients in the funnel?
3. What one improvement will we make this week?

Remember:

You can't improve what you don't measure.

This Scorecard is your practice's truth meter - update it weekly, review monthly, and use it to make smarter marketing decisions.

Need help interpreting your results?

Schedule a 15-minute strategy session with our team to review your numbers and find your fastest path to growth.

Book My Strategy Call