

Month

Sound Chiropractic Center Dr.

Marketing Analysis Sheet

#	Date	Patient	Referral	DC	Staff	Loc	Sign	Yellow Pages	Screening/ Screener	NPOC	Radio Mailer	TV	ROF	Continuing Visit Communication	Attny	Q/T	Reason Didn't Treat																				
																	No Money	No Problem	Live Too Far	No Confidenc e	Other																
1																																					
2																																					
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15																																					
Totals:																																					

Instructions

1. Log each new patient who comes into the office when they come into the office. Do NOT log any new patients in advance; they may not actually show up for their appointment.
2. Note the method of referral. If they were referred by 2 or more sources, only log 1 source for each patient on this form. (For example, if a new patient was referred by both another patient plus the location, select the more important referral source and mark that on the log).
3. In the "Q/T" (Qualified/Treat) column, write a "Q" if they were qualified (this means that the patient was pre-screened about money, living within a reasonable driving distance to your office, etc.). If they choose not to treat, place a check mark in the corresponding column.
4. To determine the totals, go to each referral method column and add up the numbers in each column in front of the heavy horizontal line between the columns "Attny" and "Q/T" (i.e. if there were 3 new patients referred by current patients, you'd write "3" in the "Referral" total at the bottom of the sheet.) The totals in each column across the page should add up to the total number of new patients (i.e. if you had 10 new patients for the month, you'll have 10 methods of referral).
5. Total each column after the heavy horizontal line. Your total number of new patients and the total number of treaters/non-treaters may not match. This can be due to patients who qualify but choose not to treat.