

## Business Balanced Scorecard & Key Performance Indicators

Client name

Nov- 2004

Major Concern		-ve variance
Minor Concern		-ve variance
No Concern		+ve/neutral

Financial		Month plan	Month actual	Comment	Action		
	Principal Dentist 1 - Fees £ 000s	12.00	8.00				
	Principal Dentist 2 - Fees £ 000s	0.00	0.00				
	Associate 1	9.00	8.91				
	Associate 2	3.50	2.65				
	Total Gross fees	24.50	19.56				
	Materials/gross fees %	9%	9%				
	Lab costs/gross fees %	11%	8%				
	Admin exp/gross fees %	11%	11%				
	Employee cost/gross fees %	35%	31%				
	Finance cost/gross fees %	12%	12%				
	Gross profit %	38%	45%				
	Net profit %	-53%	-44%				
	EBITDA - %	-23%	-21%				
	Patient cases over £1000	0	0				
	No. of teeth whitening cases	0	0				
Sundries Fees - £000s	0	0					

Customers		Month plan	Month actual	Comment	Action		
	Patient referrals	4	5				
	Local business referrals	2	2				
	Website enquiries	10	12				
	Gym referrals	10	6				
	Walk by referrals	15	13				
	Flyer referrals	0	1				
	Station advert	4	0				
	Word of mouth	15	9				
	Other	0	0				
	Total new patient registrations	60	48				
	Patients seen by Principal	0	0				
	Patients seen by Assoc. 1	0	0				
	Patients seen by Assoc. 2	0	0				
Customer compliments	0	0					

Operations		Month plan	Month actual	Comment	Action		
	Patient complaints	0	0				
	No. of patient waiting times over 10 min	0	0				
	Patient cancelled appointments within 24hrs	0	0				
	Missed appointments by patients	0	0				

People		Month plan	Month actual	Comment	Action		
	Customer compliments	0	0				
	Staff sick days	0	0				
	Going the extra mile by team member	0	0				

Innovation		Month plan	Month actual	Comment	Action		
	New marketing ideas/inspirations	0	0				
	Training hours for staff	0	0				
	Number of alternative treatments	0	0				

**Notes on how to Use**

Please do not forget the nature of the KPI (whether we are measuring a positive aspect or negative aspect) in setting the formulas  
 If the nature of the KPI changes, depending on the client's requirements, change the traffic light formula accordingly  
 There are only two types of formulas for + ve & - ve KPIs