



Dear Colleague,

Thank you for your interest in Marsha Freeman & Associates!

As a special gift to you for taking the time to learn more about Marsha Freeman & Associates, I would like to offer you a ***Complimentary Consultation Teleconference*** at no charge to discuss your current practice management position and to specifically address the special needs you have in improving the way you provide care for your patients. I have enclosed a short questionnaire to aid you in crystallizing your issues.

Please, complete your practice information questionnaire prior to your consultation. You can return it via facsimile to **(805) 929-0454**. I will promptly respond by contacting your office to schedule your telephone conference as soon as possible.

I look forward to talking with you soon!

Sincerely,

*Marsha Freeman*

# COMPLIMENTARY CONSULTATION QUESTIONNAIRE

Date: \_\_\_\_\_ Name: \_\_\_\_\_

Phone #'s: office \_\_\_\_\_ fax \_\_\_\_\_ home \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_ Type of

Practice: \_\_\_\_\_

# of Dentists: \_\_\_\_\_ # of Hygienists: \_\_\_\_\_ # of RDA's / DA's: \_\_\_\_\_ # of front office staff: \_\_\_\_\_ # other staff: \_\_\_\_\_

1. What three things do you want most from your practice or career?
2. If you could change one thing about your practice, what would it be? Why?
3. What are the major strengths of your practice?
4. What are the major challenges of your practice?
5. What percentage of your practice is: Fee for Service \_\_\_\_\_? Insurance \_\_\_\_\_? Managed Care \_\_\_\_\_?  
What would you like it to be: Fee for Service \_\_\_\_\_? Insurance \_\_\_\_\_? Managed Care \_\_\_\_\_?

6. When did you last update your fees?

7. Do you consider your current fees to be (circle one):    High    Average    Below Average    Low

8. Your ideal day...	would look like this:	currently looks like this:
a. total # of patients	_____	_____
b. # of new patients	_____	_____
c. # of recall exams	_____	_____
d. production	_____	_____
e. collections	_____	_____
h. stress level	_____	_____
i. your morale	_____	_____
j. staff morale	_____	_____

9. Is your business:    Growing \_\_\_\_\_    Stagnant \_\_\_\_\_    Declining \_\_\_\_\_? Why?

10. Please name three areas you personally want to improve.