The Revenue Waterline

A four-part assessment of how much of your revenue you can actually see — from first click to accepted treatment.

In 1997, Apple's CEO described the company as a ship with a hole in the bottom, and said his job was to point it in the right direction. Someone in the room asked: **"But what about the hole?"**
Most practices do the same thing with marketing — steer harder, spend more, and never check the hole. This assessment finds your waterline before you pour in another dollar.

HOW TO SCORE IT

Every row uses the same four answers: **No idea = 0** · **Rough idea = 1** · **For some = 2** · **For all = 3.** Tick one box per row, write the points on the right, and add up each part. Be honest — a number you can't see is a leak you can't fix.

PART 1 — WHERE YOUR LEADS COME FROM

For each source: do you know how many of its leads become accepted treatment? A source you don't use scores 0.

#	LEAD SOURCE	DO YOU KNOW WHAT IT TURNS INTO?				POINTS
		No idea 0	Rough idea 1	For some 2	For all 3	
A1	**Referrals**	☐	☐	☐	☐	
A2	**Social media**	☐	☐	☐	☐	
A3	**Paid ads**	☐	☐	☐	☐	
A4	**Local search (Google)**	☐	☐	☐	☐	
A5	**Other:** _____	☐	☐	☐	☐	
					PART 1 POINTS →	_____

PART 2 — THE PATIENT JOURNEY

#	STAGE	DO YOU KNOW THIS NUMBER?				POINTS
		No idea 0	Rough idea 1	For some 2	For all 3	
B1	**Reached Out** Do you know how many of the people who find you actually call, book online, or fill in a form?	☐	☐	☐	☐	
B2	**Answered** Do you know how many of those calls and forms get a real person — a picked-up call or a same-day reply?	☐	☐	☐	☐	
B3	**Booked** Do you know how many of the people you speak with book an appointment?	☐	☐	☐	☐	
B4	**Presented** Do you know how many patients who come in have full treatment presented to them?	☐	☐	☐	☐	
B5	**Accepted** Do you know how much of the treatment you present turns into an accepted full treatment plan?	☐	☐	☐	☐	
B6	**Followed Up** Do you know how many "let me think about it" patients get followed up until they decide?	☐	☐	☐	☐	
					PART 2 POINTS →	_____

PART 3 — KEEPING PATIENTS COMING BACK

The patient you already have is the cheapest one you'll ever get. This is where most practices quietly lose them.

#	AFTER THE FIRST VISIT	DO YOU KNOW THIS NUMBER?				POINTS
		No idea 0	Rough idea 1	For some 2	For all 3	
C1	**Next Visit Booked** Do you know how many patients leave with their next appointment already booked — treatment, hygiene, or checkup?	☐	☐	☐	☐	
C2	**Unscheduled Treatment** Do you know how many patients have treatment diagnosed but never put on the schedule?	☐	☐	☐	☐	
C3	**Overdue Checkups** Do you know how many patients are past due for their recall or checkup right now?	☐	☐	☐	☐	
C4	**Inactive Patients** Do you know how many patients haven't been in for 18 months or more?	☐	☐	☐	☐	
					PART 3 POINTS →	_____

DIGITAL VISION · THE REVENUE WATERLINE AUDIT — DENTAL

Additional Revenue Leaks

Six places practices lose money without knowing it.

PART 4 — THE NUMBERS BEHIND THE PRACTICE

#	WHERE THE LEAK HIDES	HOW WELL DO YOU TRACK THIS NUMBER?				POINTS
		No idea 0	Rough idea 1	For some 2	For all 3	
D1	**Daily Production Per Chair** What one chair bills in a day. Under $2,500/day is a red flag. $6,000+/day is strong.	☐	☐	☐	☐	
D2	**Overhead (% of Collections)** Staff, supplies, rent, lab — everything it costs to run the practice, as a share of what you collect.	☐	☐	☐	☐	
D3	**Missed & Unreturned New-Patient Calls**	☐	☐	☐	☐	
D4	**Speed to Respond to Patient Inquiries** How fast you reply to a call, form, or DM. Under 60-seconds is the target — slower, and most patients have already called the next practice.	☐	☐	☐	☐	
D5	**Treatment / Case Acceptance Rate** The share of proposed treatment plans patients say yes to.	☐	☐	☐	☐	
D6	**No-Show / Late-Cancel Rate** Appointments that go empty without warning.	☐	☐	☐	☐	
					PART 4 POINTS →	_____

YOUR REVENUE WATERLINE

Part 1 ____ + Part 2 ____ + Part 3 ____ + Part 4 ____ = ____ / 63 · Grade: ____

A	B+	B	C+	C	C−	D	F
57–63	51–56	45–50	39–44	33–38	27–32	20–26	under 20

A – B	C+ – C−	D – F
You can see most of where your revenue goes. The question is which leak to fix first.	Big parts of your revenue are running blind. Money is leaking in places you can't see yet.	You're steering without instruments. More marketing will leak straight back out.

GOT YOUR GRADE?

Find out what your numbers actually mean.

Book a call and we'll walk through your Revenue Waterline with you — what your score is telling you, the changes you can apply in your practice right away, and how to raise your waterline before you spend another dollar on marketing.

Book your free Revenue Waterline Audit Strategy Call →

digitalvision.io/revenue-waterline-audit

If we don't find at least 5x our fee in time saved or new money, you don't pay.

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All I talk about is how to implement systems, AI, and automations into dental practices - so you can buy back your time and build a practice you love. More at **www.digitalvision.io**

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