ExcelaDent
Practice growth solutions

Marketing Systems

Recommendation

Prepared for Anthony Dental Care

Practice by Numbers, GoHighLevel, Practice ZEBRA and ad-spend tracking

November 2026

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The short version

We recommend finishing the move to Practice by Numbers and buying the tier that includes its marketing module. One platform then covers patient communication, online booking, forms, reviews, call tracking and marketing return on investment, and it reads production straight from both practice management systems. With that in place we see no need for Practice ZEBRA, and the CRM we raised on the call, GoHighLevel, would duplicate most of what the practice is already paying for. We recommend leaving it out.

A note on how we got here: this is based on our own review of Practice by Numbers' published documentation, release notes and user feedback, plus what we learned on the discovery call. Vendors change their packaging and features often, so your Practice by Numbers rep may be able to update or clarify some of the specifics, and we have listed the points worth asking about at the end.

Ad spend tracking, the thing Tom wants settled before spending more, happens inside Practice by Numbers, with each ad channel wired into it so the return-on-spend report is live rather than assembled by hand. The sections that follow walk through our reasoning.

What the practice has today

System	Role	Status
Open Dental	Practice management at Sunbury, Centerburg and South High	In place
Dentrix Ascend	Practice management at Metz Center (came with the acquisition)	In place
Dental Intelligence	Confirmations, online forms with write-back, analytics	Being replaced
Practice by Numbers	Replacement for Dental Intelligence	Decided, not yet live
Whiteboard Marketing	Website, Google profile posts, Google and Facebook ads	In place
Direct mail	Valpak new-mover mailers and a targeted Centerburg mailer	Used periodically
In-house social	Weekly Facebook and Instagram posts	In place
Practice ZEBRA	Call tracking and marketing attribution	Under consideration
GoHighLevel	Front-end CRM and reporting	Proposed on the discovery call

Two things shaped our thinking. Practice by Numbers is already on the way in, and it does far more than Dental Intelligence did. And the practice runs two different practice management

systems, which matters for any tool that needs to read or write patient data: it has to connect to both, and the Dentrix Ascend side is newer and less proven for every vendor we looked at.

What Practice by Numbers covers

Practice by Numbers sells five tiers. The lower tiers are analytics and patient communication. The top tier, Thrive, adds the marketing module, phone system and enterprise controls that make it a complete replacement for the other tools on the list.

Area	What it does	Tier
Analytics	400+ practice KPIs, multi-location rollups, daily huddle, treatment-plan tracking, insurance verification	All tiers
Patient communication	SMS, email and voice reminders with confirmation write-back; recall and reactivation campaigns; two-way texting from the office number; patient portal	Core and up
Online booking and forms	Booking requests into the PMS schedule (pending approval by default); intake forms that write back as PMS documents; kiosk mode	Flow and up
Reviews	Automated Google, Yelp and Facebook review invites after visits, with exclusion rules, follow-ups and AI-drafted replies	Flow and up
Payments	Text-to-pay with posting to the PMS ledger	Add-on
Marketing IQ	Dynamic call-tracking numbers, call recordings, lead tracking, referral-source performance, marketing ROI matched to PMS production, Google Ads and Analytics import, website chat	Thrive, or add-on
Voice and Call AI	Built-in phone system, call transcription, scoring and sentiment	Add-on
AI receptionist	24/7 answering and booking	Add-on; requires online booking

Both practice management systems are supported. The Open Dental connection is mature and writes back in near real time. The Dentrix Ascend connection is new this year, polls every few minutes rather than syncing live, needs its own Practice by Numbers account for the Metz Center office, and does not alert anyone when it falls behind. That is workable, but Metz Center should be set up second and watched for the first month.

Two limits to know about. Practice by Numbers has no public API, no Zapier and no webhooks, so nothing outside it can push leads in or read appointment status out; the only outbound hooks are Google Tag Manager events and QuickBooks. And the vendor publishes only a starting price of $249 per month; everything above that is quoted. The CEO has stated an average of roughly $12,000 to $13,000 per location per year, or $18,000 to $19,000 with phones, AI and payments included. For four offices that is a meaningful line item, and the contract does not allow mid-term cancellation, so we recommend starting on monthly terms.

Why not GoHighLevel

On the call we described GoHighLevel as a customizable front end for lead capture, booking, forms and reporting. After going through Practice by Numbers feature by feature, we found most of that is already covered, and the parts that are not do not justify a second system for this practice.

Capability	Practice by Numbers	GoHighLevel
Reminders, confirmations, recall	Yes, PMS-aware	Yes, but not PMS-aware
Online booking into the schedule	Yes	Calendar only; needs a PMS sync
Intake forms to the PMS	Yes	Needs a PMS sync
Review requests after visits	Yes, triggered by the PMS	Yes, but no visibility into visits
Two-way texting	Yes, from the office number	Yes
Call tracking and recordings	Yes (Marketing IQ)	Yes
Marketing ROI tied to production	Yes, reads the PMS	Tracks web and phone leads to source, but not what the patient produced once treated
Ad landing pages and funnels	No	Yes
Missed-call text-back	Yes (Ops AI auto text-back)	Yes
Social post scheduling	No	Yes
AI phone answering	Add-on	Add-on, per-minute billing
Connects to Dentrix Ascend	Yes	No documented path

What decided it for us: GoHighLevel cannot see the practice management system without middleware, and the middleware we reviewed has no documented support for Dentrix Ascend, so it would cover three offices and not the fourth. Running its reminders or review requests alongside Practice by Numbers would mean two systems texting the same patient, with no way to coordinate opt-outs between them. And while it ties web and phone leads back to the campaign that produced them, its attribution stops at the booking; it cannot tell the practice what a Google patient was worth once they sat in the chair, which is the number Tom asked for.

What GoHighLevel does better is landing pages, social scheduling and agency-side reporting. We can provide those without adding a second platform to the practice, so we are leaving it out.

And Practice ZEBRA

Practice ZEBRA does campaign call-tracking numbers, call scoring, texting and PMS-matched return on marketing spend. That is the same ground as Practice by Numbers' Marketing IQ and Call AI. The only reason to keep it would be if the practice continues Patient NEWS mailers and

wants mailer-specific numbers from the same vendor; even then, its texting and review features should be turned off so it is not a third system messaging patients. We recommend skipping it.

How ad spend gets tracked

The question from the call was how to know what a marketing dollar returns, per channel and per office, before spending more. Here is the loop, and where each piece lives.

Step	Where it lives	How
Spend	Google Ads, Meta Ads Manager	One campaign per office, named by location.
Click to website	GA4 via Google Tag Manager	Every ad link carries a source and campaign tag (for example google / southhigh-emergency).
Form or booking	Practice by Numbers online booking and web chat	Practice by Numbers fires a booking event to Tag Manager; Tag Manager sends it to Google Ads and the Meta pixel as a conversion, and the source tag is recorded on the patient.
Phone call	Practice by Numbers call tracking	One tracking number per channel per office, swapped in by script so the page HTML keeps the real office number. Calls are recorded and attributed.
Patient shows and is treated	Open Dental / Dentrix Ascend	Practice by Numbers reads it.
Return on spend	Practice by Numbers Marketing IQ	Matches the lead source to production. Google Ads spend imports natively; Meta spend may need to be entered monthly.

Channel by channel

Each channel delivers leads differently, so each needs its own path into Practice by Numbers. The pattern is the same for all of them: a dedicated tracking number per channel per office, a tagged link for anything that goes to the website, and the PMS referral-source field as the backstop.

Google Ads (search). The ad click lands on a location or landing page with source and campaign tags on the link. The number-swap script recognizes the Google source and shows that office's Google tracking number, so calls are recorded and logged as Google Ads leads. Online bookings and web chats carry the tags onto the patient record, and Practice by Numbers fires the booking event through Tag Manager back to Google Ads as a conversion, which lets Google optimize toward bookings instead of clicks. Call assets on the ad use the same tracking number. Spend imports into the ROI report automatically.

Google Local Services Ads. Google owns these leads: calls come through a Google forwarding number and message leads sit in the LSA inbox, not on the website. We set the LSA forwarding destination to a tracking number dedicated to LSA for each office, so every LSA call lands in

Practice by Numbers tagged as LSA, recorded and matched to production if they book. Message leads have to be worked by the front desk from the LSA dashboard and entered with LSA as the referral source. Spend and lead counts come from the LSA dashboard and are entered into Practice by Numbers monthly; LSA also allows disputing junk leads, which keeps its cost per lead honest.

Meta ads. We recommend running these as traffic campaigns to a landing page, which then works exactly like Google Ads: tagged link, a Meta tracking number swapped in for Meta visitors, the booking widget on the page, and the booking event sent to the Meta pixel as a conversion. If the practice prefers Meta's instant lead forms for offers like whitening specials, the lead stays inside Meta; the front desk calls the person and records Facebook as the referral source, and the form's thank-you screen should carry a booking link so motivated leads book themselves. Whether Meta spend imports into Practice by Numbers or is entered monthly is one of the questions for the rep.

With that in place the ROI report shows, per office, Google Ads, Local Services, Meta, mailers (on their own tracking numbers) and word of mouth, each with leads, booked, shown and production. The two gaps are LSA messages and Meta lead forms, and both are closed by the same front-desk habit of asking and recording the source.

Three things make the numbers trustworthy:

1. **One phone number per office in the website code,** with tracking numbers inserted by script. This also fixes the inconsistent numbers that are currently hurting Google Maps rankings.
2. **A consistent "how did you hear about us" at all four front desks,** recorded in the PMS referral-source field. That field is what the ROI report uses for walk-ins and referrals, and it is what makes the word-of-mouth percentage credible.
3. **Campaign naming that matches across Google, Meta and Practice by Numbers,** so the same office and channel line up in every report.

Questions for the Practice by Numbers rep

We would want these answered before the contract is signed. None of them are deal-breakers on their own, but each one changes how we set things up.

#	Question	Why it matters
1	Per-location pricing for the Thrive tier, the setup fee, and whether monthly terms are available	Published pricing is a floor only; the contract has no mid-term exit
2	How does the Open Dental connection work today (local agent or API), and is Open Dental Cloud supported?	Open Dental's own documentation says the older bridge was removed
3	Can online booking be set to auto-accept into the schedule rather than pending approval?	Pending-approval booking adds front-desk work and delays confirmations
4	Can review requests be routed to each office's own Google profile?	Sunbury's page currently shows Centerburg's reviews
5	Is call-number swapping true dynamic insertion (local number stays in the HTML)?	If not, a WordPress plugin handles the swap
6	Does Marketing IQ import Meta ad spend, or only Google?	Decides whether Meta is entered manually
7	What are the known limitations of the Dentrix Ascend connection, and how is a stalled sync surfaced?	Metz Center is the office most exposed

Rollout order

1. **Confirm the seven items above and sign on monthly terms.**
2. **Go live at Sunbury first** (largest office, mature Open Dental connection), then Centerburg and South High, then Metz Center with its own account.
3. **Turn off Dental Intelligence messaging the day each office goes live on Practice by Numbers** so no patient receives reminders from two systems.
4. **Put tracking numbers and the booking conversion event on the website,** and replace every published phone number with the office's main line.
5. **Set the referral-source script at all four front desks.**
6. **Connect Google Ads, Local Services and Meta to their tracking numbers and tags** before the first new campaign launches.
7. **Review the first full month's ROI report with Tom** and set channel budgets from it.