

Private Patient Growth Plan

Plan for growth. Build for loyalty.

This strategic planning tool helps you map out how to attract, retain, and re-engage private patients — with clear KPIs, team goals, and follow-up strategies. Use it to align your team and track what matters most.

1. Lead Management

How are you currently capturing and managing new patient enquiries?

- Are all leads centralised in one system (e.g. Agilio DenGro)?
- Are you responding within 5–10 minutes?
- Are you tracking source and conversion rates?

KPI Targets:

- Response time: under 10 minutes
- Lead-to-consultation conversion rate:

Custom Goals:

2. Team Communication

How confident is your team in handling private enquiries?

- Are they using emotionally intelligent language?
- Do they have scripts or tools like a patient communication and follow-up toolkit to support in this area?

KPI Targets:

- % of team trained in communication:
- % of calls converted to consultations:

Custom Goals:

3. Patient Follow-Up

How do you nurture leads who aren't ready to book today?

- Are you using automated follow-ups via SMS, email, WhatsApp?
- Are you segmenting fast, medium, and slow-lane patients?

KPI Targets:

- Follow-up completion rate: %
- Re-engagement rate: %

Custom Goals:

4. Marketing Strategy

How are you attracting new private patients?

- Are you using social media, referrals, SEO, and paid ads?
- Are you tracking ROI by channel in with DenGro CRM?

KPI Targets:

- Cost per lead: £
- Top 3 lead sources:

Custom Goals:

5. Conversion Optimisation

How are you improving treatment acceptance?

- Are you using testimonials, before/after photos, and video follow-ups?
- Are you tracking objections and refining messaging?

KPI Targets:

- Treatment acceptance rate: %
- No-show rate: %

Custom Goals: _____

Let's grow your practice together.

No setup fees • Unlimited users • No training required

Book a quick demo to see how DenGro's AI-powered dental CRM can help your team convert more leads and deliver a 5-star patient experience.

Scan for Demo

