

Map the patient journey you actually operate.

Complete this with the current process—not the ideal one. If work flows differ by location or treatment, use a separate worksheet for each.

TREATMENT

☐ TMS☐ Spravato☐ Ketamine☐ Other☐ LOCATION

WHAT TO DEFINE	01 INQUIRY	02 FIRST CONTACT	03 QUALIFIED	04 EVALUATION	05 TREATMENT START	06 COMPLETION
CONVERSION EVENT What must happen?						
PRIMARY OWNER One named role						
TIMING STANDARD Max time to next action						
FOLLOW-UP Channel + cadence						
EXIT / LOSS REASON Why did progress stop?						
SOURCE OF TRUTH Where is status visible?						

FIND THE FIRST BREAK

Circle the first stage where ownership, timing, follow-up, or measurement is unclear. That is the constraint to fix before adding more demand.

Score whether the clinic is ready to multiply.

Rate each statement from 1 to 5, then total each category. Score the system that exists today—not the one you plan to build.

1 Ad hoc or unowned

3 Documented but inconsistent

5 Consistent and measurable

DEMAND QUALITY

TOTAL ____ / 25

- Capacity goals define the volume needed.
- Awareness and high-intent capture both work.
- Ads are evaluated beyond cost per lead.
- Source and ad-level attribution persist.
- Demand is predictable enough to plan.

INTAKE OWNERSHIP

TOTAL ____ / 25

- Every inquiry has one named owner.
- Response-time standards are documented.
- The owner has protected intake bandwidth.
- Scripts and cadence match the modality.
- Ownership continues to first appointment.

CONVERSION VISIBILITY

TOTAL ____ / 25

- Funnel stages and events are defined.
- Lead source persists downstream.
- Disposition and drop-off reasons are captured.
- Conversion is reviewed regularly.
- Budget follows downstream conversion.

OPERATIONAL CAPACITY

TOTAL ____ / 25

- Schedules can absorb additional starts.
- VOB, PA, or payment workflows are documented.
- Patient communication is consistent.
- Starts, shows, and completion are monitored.
- Growth does not depend on heroic effort.

LOWEST CATEGORY

NEXT 30-DAY PRIORITY

READINESS RULE

Any category below 15 is a constraint, regardless of total score.