THE DIRECT CARE MARKETING SCORECARD · A MONTHLY WORKSHEET

8 numbers that tell you if your marketing is working.

Same day each month, same eight numbers. Pull them from your membership platform, your books and your inquiry log, write them in, and compare to last month. Fifteen minutes. You're not grading yourself against anybody else — you're watching your own practice move.

AWARENESS

1 New members this month, by source

Pull from: your inquiry log or intake form ("How did you hear about us?")

REFERRAL	WEBSITE / SEARCH	SOCIAL
EMPLOYER	EVENTS	OTHER

THIS MONTH · TOTAL	LAST MONTH · TOTAL

CONSIDERATION → CONVERSION

2 Lead-to-member conversion rate

FORMULA New members ÷ inquiries. Pick one and keep it.

Pull from: your inquiry log and membership platform

THIS MONTH	LAST MONTH

Days from first inquiry to enrollment (median)
Use the median, so one slow decider doesn't skew it.

THIS MONTH	LAST MONTH

CONVERSION

3 Cost per new member

FORMULA Total marketing spend ÷ new members, all in.

Pull from: your books (marketing expense accounts) plus any marketing paid on a personal card

THIS MONTH	LAST MONTH

RETENTION

4 Average price per membership

FORMULA Monthly membership revenue ÷ active members.

Pull from: your membership platform's monthly revenue report

THIS MONTH	LAST MONTH

RETENTION

5 Member lifetime value

FORMULA Avg. price (#4) × avg. months a member stays.

Pull from: #4 plus your membership platform's cancellation history

THIS MONTH	LAST MONTH

THE SCOREBOARD

6 Lifetime value to cost-per-member ratio

FORMULA Lifetime value (#5) ÷ cost per new member (#3).

Pull from: #5 and #3

THIS MONTH	LAST MONTH

THE SCOREBOARD

7 Payback months

FORMULA Cost per new member (#3) ÷ monthly gross margin per member.

Pull from: #3 and your books (direct cost of care: clinical staff, supplies, labs you absorb)

THIS MONTH	LAST MONTH

ONBOARDING / RETENTION

8 Monthly churn and net member growth

CHURN Left ÷ start-of-month members. **NET** Joined − left.

Leaving inside 90 days usually points to onboarding. Leaving later points to retention.

Pull from: your membership platform's active-member and cancellation counts

	THIS MONTH	LAST MONTH
Left within 90 days		
Left after 90 days		
Net growth		

Plus one more: marketing spend as a share of revenue

Total marketing spend ÷ total revenue.

THIS MONTH	LAST MONTH

Your numbers, tracked monthly, are the benchmark that matters.

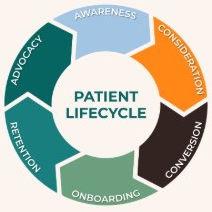
Typing on screen? Enter your raw numbers on page 5 and this page does the math.

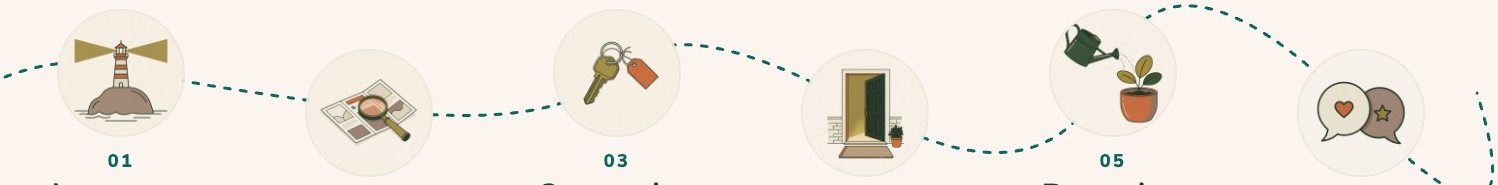
PART TWO · WHERE EACH NUMBER LIVES

Fix it where it breaks.

Every number points to one phase of the patient lifecycle. When a number slips, that's the phase to work on.

Patient Lifecycle framework: Stephani McGirr, Amplify DPC.





01 Awareness
They find out you exist.

02 Consideration
They ask questions and decide if DPC is for them.

03 Conversion
They join.

04 Onboarding
Their first 90 days.

05 Retention
They stay.

06 Advocacy
They send their friends.



Real people don't move in a straight line — they loop back, stall and jump ahead. That's normal. The numbers still show you where the friction is.

PHASE	NUMBER TO WATCH	ONE FIX
Awareness	New inquiries by source	Find the two channels behind your last 10 members. Show up there every week before you add a third.
Consideration	Response time, booking rate, days to enroll	Reply within minutes — at minimum the same business day — with a link to book a meet-and-greet and a short explainer on how membership works with or without insurance.
Conversion	Lead-to-member rate, cost per new member	End every meet-and-greet with a clear next step: sign them up on the spot, or send pricing and the enrollment link before they leave the building.
Onboarding	Left within 90 days	Book the first visit at sign-up, send a welcome series on how to reach you and what's included, and personally check in at day 30.
Retention	Left after 90 days, lifetime value	Reach out before members need you: a quarterly check-in, automated check-ins based on health conditions, and 60 days' notice with the reason for any price change.
Advocacy	New members from referrals, reviews	Ask when a member thanks you, and make it one tap: a review link and a share-with-a-friend card ready to send.

ADD TWO QUESTIONS TO YOUR ENROLLMENT FORM

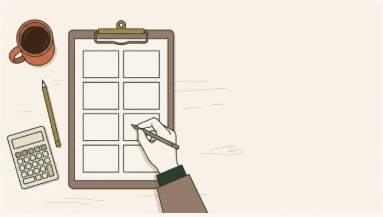
1 Where did you first hear about us?
2 What made you decide to join now?

The first tells you what built awareness. The second tells you what closed it. You need both.

PART THREE · TRACK THE TREND

A year on one page.

Copy each month's numbers from page 1 into its column, then circle the direction at the end of each row.



YEAR _____

NUMBER	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TREND
1 New members													↑ → ↓
2 Lead-to-member rate													↑ → ↓
2 Days to enroll (median)													↑ → ↓
3 Cost per new member													↑ → ↓
4 Avg. price per membership													↑ → ↓
5 Member lifetime value													↑ → ↓
6 LTV ÷ cost per member													↑ → ↓
7 Payback months													↑ → ↓
8 Left within 90 days													↑ → ↓
8 Left after 90 days													↑ → ↓
8 Net growth													↑ → ↓
+ Marketing spend ÷ revenue													↑ → ↓

WORKED EXAMPLE Example practice — not a client.

AVERAGE PRICE · #4
$90/mo
What each membership brings in.

→

LIFETIME VALUE · #5
$2,700
$90 × a 30-month stay.

→

LTV ÷ COST · #6
9 : 1
$2,700 ÷ $300 to acquire.

→

PAYBACK · #7
≈ 4.6 months
$300 ÷ $65/mo gross margin per member.

Round numbers for illustration. Run your own on page 1.

PART FOUR · BRING THESE TO YOUR NEXT MARKETING MEETING

8 questions to ask your marketing professional — or yourself.

Good marketing partners love these questions, because the answers show their work. And if you run your own marketing, they work just as well across your own desk. Write the answers down. Next month, ask again.

1 Which channel brought our last 10 members?

Ten real names, each with where they first heard about you and what made them decide now.

TIES TO #1 NEW MEMBERS BY SOURCE

2 What does it cost us to get one new member — and is that going up or down?

One number, all spend included, with a direction attached.

TIES TO #3 COST PER NEW MEMBER

3 How long until a new member pays back what we spent to get them?

Answered in months. That's the number that tells you how much growth your cash can carry.

TIES TO #7 PAYBACK MONTHS

4 What are we going to stop doing?

What to keep, what to kill. Every channel should earn its spot on this page, including the ones you like.

TIES TO #1, #3 AND MARKETING SPEND SHARE

5 How are you tracking inquiries to meet-and-greets to enrolled — and how long it takes?

Three steps, three counts. Once you can see each step, you know exactly which one to work on.

TIES TO #2 LEAD-TO-MEMBER CONVERSION

6 What's working for practices our size in our market?

Ask for specific examples, then test them against your own numbers before you spend on them.

TIES TO #3 AND #6

7 What will you report to me monthly, and on what day?

Put it on the calendar. Same day, same numbers — page 1 is a good place to start.

TIES TO ALL EIGHT

8 What should I expect in 90 days?

Agree on it now, in the numbers from page 1, so the check-in in three months is a short conversation.

TIES TO #1, #2 AND #8

Talk numbers with Nate

Bring your filled-in scorecard. We'll walk through what it means for your cash flow, your pay and your taxes.

Book a Free Tax Strategy Session

goodmancpa.com/book-a-call

Talk marketing with Stephani

Book a free marketing consultation and get help with the lifecycle phase where you're stuck.

egs-solutions.com · Free consultation →

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PART FIVE · LET THE SCORECARD DO THE MATH

Type your raw numbers here. Page 1 fills itself in.

Seven numbers from your books and your membership platform. As you type, page 1 calculates your conversion rate, cost per new member, average price, lifetime value, the ratio, payback months, net growth and marketing spend share.

RAW NUMBER	THIS MONTH	LAST MONTH	USED IN
A Inquiries *Every call, form and message. Pull from: your inquiry log*			FEEDS #2
B Total marketing spend, all in *Pull from: your books, plus marketing paid on a personal card*			FEEDS #3 · #7 · SPEND SHARE
C Monthly membership revenue *Pull from: your membership platform's revenue report*			FEEDS #4
D Active members *Pull from: your membership platform*			FEEDS #4 · #7
E Average months a member stays *Pull from: your membership platform's cancellation history*			FEEDS #5
F Monthly direct cost of care *Clinical staff, supplies, labs you absorb. Pull from: your books*			FEEDS #7
G Total revenue *All income, not just memberships. Pull from: your books*			FEEDS SPEND SHARE
CALCULATED Monthly gross margin per member Avg. price (#4) − direct cost of care ÷ active members.			FEEDS #7

TYPED ON PAGE 1

New members by source (#1), days to enroll (#2) and members who left (#8) go straight into their boxes on page 1. The math picks them up from there.

FOR THE MATH TO RUN

Open this file in Adobe Acrobat Reader (free), Chrome or Edge. Other viewers let you type but may not calculate. Save the file to keep your numbers for next month.