

PRACTICE _____

DATE _____

☐ **Rough:** one row, not yet segmented**A3** Value-Estimate Sheet*What the list is worth in year one, net, one line at a time.***Mark every assumption in bold. Beside each one, write what will replace it and when.**

On paper: tick the Assumption box, and write what replaces it, and when, under "Where it came from". = marks a formula line.

PART 1 The inputs Collections, not fees

LINE	YOUR FIGURE	ASSUMPTION	WHERE IT CAME FROM
Clean inactive patients		☐	A4
Reachable		☐	A5
First visit collected exam, X-rays, cleaning		☐	Last year's collections
Repeat-visit share in year one		☐	
Routine visit collected		☐	Last year's collections
First-year base value first visit + share × routine visit		=	Formula
Average old treatment plan inactive patients only		☐	Open-plan report
Still-valid share / acceptance in year one		☐	Agreed with the dentist
Plan value still valid × accepted × average plan		=	Formula
Contact cost per reachable patient		☐	
Staff minutes per reachable patient		☐	
Loaded staff cost per hour		☐	Payroll
Cost per reachable patient		=	Formula
Baseline: would return anyway, per window		☐	Last quarter's unprompted returns

WORK IT The three formula lines

First-year base value $\frac{\text{first visit collected}}{\text{first visit collected}} + \frac{\text{repeat share}}{\text{repeat share}} \times \frac{\text{routine visit collected}}{\text{routine visit collected}} = \frac{\text{base value}}{\text{base value}}$

Plan value $\frac{\text{still-valid share}}{\text{still-valid share}} \times \frac{\text{acceptance rate}}{\text{acceptance rate}} \times \frac{\text{average old plan}}{\text{average old plan}} = \frac{\text{plan value}}{\text{plan value}}$

Cost per reachable patient $\frac{\text{contact cost}}{\text{contact cost}} + \frac{\text{staff minutes}}{\text{staff minutes}} \div 60 \times \frac{\text{hourly staff cost}}{\text{hourly staff cost}} = \frac{\text{cost per reachable}}{\text{cost per reachable}}$

A3 Value-Estimate Sheet

Continued. Run the estimate once for each segment, newest first.

DATE _____

PART 2 The segments

Months since the last completed visit

	NEWEST SEGMENT 1 18-24 mo	SEGMENT 2 25-36 mo	SEGMENT 3 37-60 mo	OLDEST SEGMENT 4 61+ mo	TOTAL
Clean patients					
Reachable					
Open-plan share					<i>not summed</i>
Return rate ASSUMPTION assumption until measured					<i>not summed</i>
Returners before baseline reachable × rate					
Less: baseline patients × baseline rate					
Incremental returners before baseline - baseline, not below zero					
Value per returner base value + open-plan share × plan value					<i>not summed</i>
First-year collected incremental returners × value per returner					
Outreach cost reachable × cost per reachable patient					
Net, first year first-year collected - outreach cost					

Band edges shown are the book's, with an 18-month cut-off (Chapter 5). If yours differ, cross them out and write your own.

Floor (every old plan set to zero)

FIRST-YEAR COLLECTED _____

NET _____

CHECK The formulas behind each row

Appendix C

returners before baseline = reachable × return rate
 baseline returners = patients × baseline rate
 incremental returners = the larger of zero and (returners before baseline - baseline returners)
 value per returner = first-year base value + open-plan share × plan value
 outreach cost = reachable × cost per reachable patient
 first-year collected = incremental returners × value per returner
 net = first-year collected - outreach cost

A segment with no incremental returners isn't worked, so it carries no cost. The baseline uses every patient in the segment, reachable or not.

Show the dentist the floor first, then the net. Say "first year" out loud. · Counts and totals only: no patient names on this sheet.