



Dental Practice Discovery Call Questionnaire

*The questions to ask a dental practice owner on a discovery call, so you qualify
the fit before either of you commits.*

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How to Use This Template

Make a copy of this document (File, then Make a copy) and keep it open during discovery calls with prospective dental practice clients. Fill in one copy per practice. The goal isn't to interrogate: work the questions into conversation and note what you hear. The last section helps you decide whether to propose an engagement.

Practice Basics

Practice name and location: _____

Owner or decision-maker on the call: _____

Number of operatories and providers: _____

Years in operation: _____

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Current Production Numbers

Monthly production (their number, even approximate): _____

Monthly collections, and the gap between the two: _____

How production has trended over the last 12 months: _____

Case Acceptance

Their case acceptance rate, if they track it: _____

If they don't track it: how do they know when treatment plans stall? _____

Who presents treatment plans today: _____

Team Size and Turnover

Current team size and roles: _____

Departures in the last 12 months, and why: _____

The role that's hardest to keep filled: _____

Biggest Pain Point

In their words, the one thing they'd fix tomorrow: _____

How long it's been a problem: _____

What they've already tried: _____

Prior Coaching and Consulting Experience

Have they worked with a coach or consultant before? Who? _____

What worked and what didn't: _____

Why that engagement ended: _____

Fit Check (Fill In After the Call)

Is their biggest problem one you can genuinely help with? _____

Budget signals from the conversation: _____

Your call: propose, refer out, or pass. _____

Action	Due Date	Done?