



Healthcare Growth Systems Scorecard

A practical executive assessment for evaluating the systems behind sustainable healthcare growth.

STRATEGY	MARKETING	BUSINESS DEVELOPMENT
REFERRALS	CRM	ANALYTICS + AUTOMATION

Designed for: CEOs, founders, executive directors, administrators, growth leaders, marketing leaders and business development leaders.

Use this scorecard to identify where your organization is strong, where growth infrastructure is inconsistent, and where leadership may need to prioritize improvement.

Organization: _____

Completed by: _____

Title: _____

Date: _____

How to Use the Scorecard

Rate each statement from **1 to 5** based on your organization's current state. Score what is actually happening today - not what is planned.

1	2	3	4	5
Not in place	Early / inconsistent	Partially structured	Well established	Optimized / measurable

Scoring: Each section contains five statements and has a maximum score of 25. The full scorecard has a maximum score of 150.

Tip: If leadership team members score the same area very differently, that gap is useful information. It may signal inconsistent processes, visibility or accountability.

1. Growth Strategy	SCORE
1. Leadership has a documented growth strategy with clear priorities, target markets and measurable objectives.	1 2 3 4 5
2. Marketing, business development and operational growth priorities are aligned.	1 2 3 4 5
3. The organization has clearly defined ideal patients, referral partners, customers or market segments.	1 2 3 4 5
4. Growth initiatives have assigned owners, timelines and accountability.	1 2 3 4 5
5. Leadership reviews progress against growth priorities on a consistent cadence.	1 2 3 4 5
SECTION TOTAL	____ / 25

2. Marketing System	SCORE
1. Marketing activities are tied to specific organizational growth objectives.	1 2 3 4 5
2. The organization has clear positioning and messaging that differentiates it in the market.	1 2 3 4 5

3. Marketing channels and campaigns are selected based on defined audiences and goals.	1 2 3 4 5
4. Lead sources and campaign performance are consistently tracked.	1 2 3 4 5
5. Marketing performance is reviewed and optimized using measurable results.	1 2 3 4 5
SECTION TOTAL	____ / 25

3. Business Development System	SCORE
1. The business development team has documented goals, territories, target accounts or activity expectations.	1 2 3 4 5
2. Business development representatives follow a consistent outreach and follow-up process.	1 2 3 4 5
3. Opportunities move through clearly defined pipeline stages.	1 2 3 4 5
4. Leadership can evaluate both activity metrics and business outcomes.	1 2 3 4 5
5. Business development training, coaching and performance reviews occur consistently.	1 2 3 4 5
SECTION TOTAL	____ / 25

4. Referral Development	SCORE
1. The organization has identified and segmented its highest-priority referral sources.	1 2 3 4 5
2. Referral partner relationships and interactions are documented and tracked.	1 2 3 4 5
3. There is a defined process for outreach, follow-up, nurturing and re-engagement.	1 2 3 4 5
4. Referral volume and referral-source performance are measured over time.	1 2 3 4 5
5. The organization is actively reducing dependence on a small number of referral sources.	1 2 3 4 5
SECTION TOTAL	____ / 25

5. CRM & Pipeline Management	SCORE
1. A CRM or centralized system is consistently used to manage leads, referral partners and opportunities.	1 2 3 4 5
2. Team members follow defined standards for entering and updating CRM information.	1 2 3 4 5
3. Pipeline stages, ownership and next actions are clearly visible.	1 2 3 4 5
4. Leadership can see where opportunities originate and how they progress.	1 2 3 4 5
5. CRM data is used to guide follow-up, forecasting and growth decisions.	1 2 3 4 5
SECTION TOTAL	____ / 25

6. Analytics & Automation	SCORE
1. Leadership has a defined set of growth KPIs and reviews them consistently.	1 2 3 4 5
2. Marketing, business development, referral and pipeline data can be viewed in a useful dashboard or reporting system.	1 2 3 4 5
3. The organization can connect key activities to outcomes such as referrals, admissions, clients or revenue where appropriate.	1 2 3 4 5
4. Repetitive administrative or follow-up processes are automated when it improves efficiency and consistency.	1 2 3 4 5
5. Leadership uses performance data to identify problems, prioritize resources and improve the growth system.	1 2 3 4 5
SECTION TOTAL	____ / 25

Executive Results Summary

Transfer each section total below, then add them together for your overall Healthcare Growth Systems Score.

ASSESSMENT AREA	SCORE
Growth Strategy	____ / 25
Marketing System	____ / 25
Business Development System	____ / 25
Referral Development	____ / 25
CRM & Pipeline Management	____ / 25
Analytics & Automation	____ / 25
TOTAL SCORE	____ / 150

Score Interpretation

RANGE	STAGE	WHAT IT MAY INDICATE
120-150	OPTIMIZED	Your growth infrastructure is generally structured and measurable. Focus on integration, advanced analytics, automation, scalability and continuous optimization.
90-119	STRUCTURED	Many core systems are in place, but gaps may be limiting consistency, visibility or conversion. Prioritize the lowest-scoring areas and strengthen cross-functional alignment.
60-89	DEVELOPING	Important growth activities exist, but systems may be inconsistent or dependent on individuals. Document processes, clarify ownership and improve measurement.
30-59	FOUNDATIONAL	Your organization has significant opportunity to build the infrastructure behind sustainable growth. Start with strategy, process definition, referral/BD structure and reliable tracking.

Important: This scorecard is a strategic self-assessment, not a clinical, compliance, financial or legal audit. A high overall score can still contain a critical weakness in one area.

Priority Areas

Lowest-scoring area: _____

Second priority: _____

Third priority: _____

Executive Reflection

What is the biggest obstacle preventing the organization from building a more predictable growth system?

What should leadership improve during the next 90 days?



Next Step

Use the results to create a focused 90-day improvement plan.

Need Help?? Kirkbrook can use the completed scorecard as the starting point for a deeper Growth Assessment covering strategy, marketing, business development, referrals, CRM, analytics and automation.

Schedule Consultation online kirkbrook.com/consultation
or Call (346) 200-3500

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