



11 QUESTIONS YOUR MARKETING AGENCY CAN'T ANSWER

The Agency Invoice Checklist.

Print this. Email it to them.

Give them one week.

Then read the answers on page 4.



BEFORE YOU PAY THAT INVOICE AGAIN

THE QUESTIONS

Send all eleven in one email. A good agency answers every one with a number. Give them one week.

01

The Patient Count

How many new patients did you produce last month? Not leads. Patients. By name or chart number.

02

Cost Per Patient

What was our cost per new patient, and how does that compare to the previous three months?

03

Case Value

What is the average production value of the patients you produced? Hygiene checks and full-arch cases are not the same customer.

04

The One That Matters

Which specific campaign produced our highest-value case last quarter?

05

The Phones

How many calls came in from our marketing last month, how many were answered, and how many were booked?

06

The Change Log

What did you change in our account in the last 30 days? Show me the change log.

THE QUESTIONS, CONTINUED

OWNERSHIP AND ACCOUNTABILITY

07

Conversion Drift

What does our website convert at today, and what did it convert at the day you launched it?

08

The One True Thing

What are we saying that no other practice in our zip code can say?

09

The One That Costs You Later

If we stopped paying you today, what would we keep? The site. The domain. The ad account and its history. The pixel data. The tracking numbers. The reviews.

10

The Dormant List

We have patients who haven't been in for 18 months. How many, and what are you doing about them?

11

Accountability

What number are you accountable to next month, and what happens if you miss it?

"If you don't get a specific answer to 4 and 9 within a week, you already know."

THE SCORING KEY

HOW TO READ THE ANSWERS

Questions 1, 2, and 3 tell you whether they measure anything. Most agencies answer with impressions and click-through rate. That is not an answer.

QUESTION 4 IS THE ONE THAT MATTERS

They are not managing marketing. They are managing an invoice.

If they cannot connect one campaign to one high-value case, that is the whole story. Everything else on their report is decoration.

Question 9 is the one that costs you money later.

If the answer is "you'd keep the website" and you don't own the domain, the ad account, or the pixel history, you own a screenshot. Ask for admin access today, not on the day you leave.

A specific answer looks like this: names, chart numbers, dollar figures, dates. A vague answer looks like this: reach, engagement, brand awareness, "things take time." **You are not asking them to be perfect. You are asking them to count.**

Who Wrote This

Written by Shawn Zajas and Matthew Anderson. Shawn has spent 20 years inside dentistry. Trade show floors at 14. A dental supply company. Seven years interviewing dentists on a podcast. Matthew has tracked \$200M+ in client results across budgets from \$5K to \$500K a month. We built Beyond Agency because we got tired of watching good dentists pay for nothing.

WHAT COMES NEXT

SO WHO CAN ANSWER THESE?

If your agency went quiet on question 4 and question 9, you have your answer. The next question is what the silence is costing you.

Book The Unscheduled Production Audit. In 30 minutes we open your practice management software with you and pull the exact dollar figure of diagnosed-but-never-scheduled treatment sitting in your charts right now. You keep the number and the recovery plan whether you hire us or not.

And if we waste your 30 minutes, tell us. We'll send \$250 to the charity your practice already supports.

BOOK THE UNSCHEDULED PRODUCTION AUDIT

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Beyond Agency. The agency that tells you the truth
about where your money went.