

How to Audit a Dental Marketing Proposal

A practical scorecard for dental practice owners reviewing agency proposals, marketing retainers, Google Ads plans, website recommendations or full-service growth strategies.

Created by Wise Agency. Use this to assess any dental marketing proposal before you sign. Score based on evidence, not confidence.

How to score a proposal

Give each area a score from 0 to 5 based on what the proposal proves. Look for clear deliverables, dental-specific reasoning, tracking detail, commercial assumptions, ownership terms and reporting standards.

Score	Meaning
0	No answer, no proof, or the proposal avoids the issue.
1	Very weak. The answer is generic and could apply to any industry.
2	Basic. The idea is mentioned, but evidence or detail is limited.
3	Acceptable. The proposal explains the approach and gives some relevant detail.
4	Strong. The proposal is clear, dental-relevant and commercially sensible.
5	Excellent. The proposal connects dental-specific activity to enquiries, lead quality, booked consultations and treatment revenue.

Proposal audit scorecard

Criterion	Score 0-1	Score 2-3	Score 4-5	Your score
Proposal scope clarity	Vague deliverables, unclear ownership or bundled activity with no detail.	Some deliverables are listed, but timing, responsibility or outputs are unclear.	Clear scope, channels, deliverables, timelines, ownership and decision points.	/5
Dental sector evidence	No dental examples or only broad marketing claims.	Some dental experience, but limited proof or treatment-specific depth.	Relevant dental case examples, treatment understanding and sector-specific reasoning.	/5
Commercial objectives	Goals are clicks, traffic or awareness only.	Some lead targets, but little link to treatment value or capacity.	Connects activity to quality enquiries, booked consultations and treatment revenue.	/5
Channel strategy	Recommends channels without explaining why.	Basic channel mix, but limited role for each channel.	Explains the role of SEO, Google Ads, landing pages, website, CRM and creative clearly.	/5
Website and speed	Ignores the website or treats it as separate from marketing.	Mentions website improvements but lacks speed or conversion detail.	Audits speed, mobile UX, treatment pages, landing pages and conversion paths.	/5
Landing page plan	Sends campaign traffic to generic pages or homepage.	Uses some landing pages, but they are not clearly treatment-specific.	Uses dedicated, fast landing pages by treatment, intent and campaign.	/5
Tracking setup	No clear measurement plan beyond platform data.	Tracks leads, but with gaps across calls, forms or WhatsApp.	Tracks calls, forms, WhatsApp, source, campaign, CRM status and outcomes.	/5
Lead quality process	Counts every lead as a win.	Some lead review, but not tied to optimisation.	Defines lead quality, reviews outcomes and uses feedback to reduce wasted spend.	/5

Criterion	Score 0-1	Score 2-3	Score 4-5	Your score
Reporting quality	Reports vanity metrics and activity summaries.	Reports enquiries, but limited commercial interpretation.	Reports spend, enquiries, CPL, lead quality, booked consultations and next actions.	/5
Compliance awareness	Uses bold claims, before/after examples or finance language without caution.	Basic awareness of responsible messaging.	Handles claims, pricing, finance, consent, reviews and clinical proof responsibly.	/5
Creative and content	Generic templates, stock images or weak copy.	Acceptable content, but limited treatment-specific persuasion.	Professional creative and copy built around patient intent, trust and conversion.	/5
Contract and ownership	Unclear account access, long lock-ins or supplier-owned assets.	Some terms are clear, but risks remain.	Clear ownership of accounts, website, data, reporting, assets and exit process.	/5

Score interpretation

Total score	What it suggests
0-24	High risk. The proposal is too vague, generic or disconnected from commercial dental outcomes.
25-42	Basic proposal. It may include useful activity, but check evidence, tracking, ownership and reporting carefully.
43-54	Strong contender. The proposal has a good foundation and should be compared seriously.
55-60	Excellent strategic proposal. The agency clearly connects dental marketing activity to measurable growth.

Questions to ask before accepting the proposal

#	Question	Notes
1	What exactly is included in the proposal, and what is excluded?	
2	Which parts of the plan are strategy, production, management, reporting and support?	
3	What dental-specific evidence supports this recommendation?	
4	Which treatments is the proposal designed to grow?	
5	How does the plan connect marketing activity to treatment revenue?	
6	What assumptions have been made about budget, demand, capacity and conversion?	
7	Where will paid traffic be sent?	
8	Are dedicated landing pages included for high-value treatment campaigns?	
9	How will calls, forms and WhatsApp enquiries be tracked?	
10	Will leads connect to our CRM or enquiry follow-up process?	
11	How will lead quality be measured?	
12	How will booked consultations be reported?	
13	What will the monthly report actually show?	
14	How will the agency identify wasted spend or weak enquiries?	
15	What happens if lead volume is high but lead quality is poor?	
16	Who writes the copy, creates the ads and builds the landing pages?	
17	How is dental compliance handled around claims, finance, images and reviews?	
18	Who owns the ad accounts, website assets, tracking data and creative?	
19	What are the contract terms, notice period and exit process?	
20	What would make this proposal a bad fit for our practice?	

Red flags

#	Red flag	Seen?
1	The proposal promises guaranteed patients or guaranteed results without context.	
2	It focuses on impressions, clicks, traffic or reach without showing how enquiries are judged.	
3	It does not explain what happens after an enquiry is generated.	
4	It does not include call tracking, form tracking or source visibility.	
5	It sends all paid traffic to the homepage.	
6	It recommends channels without explaining the role of each one.	
7	It does not ask about treatment value, chair capacity or reception follow-up.	
8	It includes vague deliverables such as "SEO", "ads" or "content" with no detail.	
9	It celebrates lead volume without a lead quality process.	
10	It uses generic stock dental imagery or copied treatment copy.	
11	It does not show sample reports or explain reporting cadence.	
12	It locks the practice into long terms without clear performance visibility.	
13	It is unclear who owns accounts, assets, data or tracking setup.	

Final decision notes

Question	Notes
What did the proposal explain well?	
What felt unclear or unsupported?	
What proof did the agency provide?	
What assumptions need checking?	
What risks remain?	
Would we trust this proposal with high-value treatment growth?	
Overall score	/60

Need help reviewing a dental marketing proposal?

Wise can review your proposal, website, ad account or marketing plan against this audit. WhatsApp Wise: https://api.whatsapp.com/send/?phone=447508555106&type=phone_number&app_absent=0