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PRACTICES.
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HEALTHCARE

GROWTH AUDIT

A strategic diagnosis of growth performance and opportunity

PREPARED FOR

SUMMIT RIDGE
ORTHOPEDIC & SPORTS MEDICINE

Sample audit for a fictional practice

Prepared to demonstrate the scope, depth and presentation of a Mozart Healthcare Growth Audit.

DIAGNOSE → STRATEGIZE → EXECUTE



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Fictional Practice for Illustrative Purposes Only

SEPTEMBER 2026

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ABOUT THIS SAMPLE

Before You Read the Audit

Summit Ridge Orthopedic & Sports Medicine is a fictional practice created solely to demonstrate the type of analysis, prioritization and recommendations included in a Mozart Healthcare Growth Audit.

IMPORTANT DISCLOSURE

The practice, providers, locations, internal data, digital performance and operating conditions in this report are illustrative. Competitors, search rankings, review findings and geographic observations are simulated unless a source is specifically identified. No invented information is presented as independent third-party research.

HOW TO READ THE REPORT

The audit integrates information from the practice, the local market and digital channels, combined with Mozart's healthcare experience and strategic analysis.

FICTIONAL CLIENT DATA

Information intentionally created about Summit Ridge to make meaningful analysis possible.

SIMULATED MARKET DATA

Illustrative competitive, geographic, reputation or search observations created for this sample.

MOZART ANALYSIS

Strategic interpretation, prioritization and recommendations based on the available evidence.

LIMITED DATA

Evidence that supports direction and risk identification but not a precise financial calculation.

WHAT THIS SAMPLE INTENTIONALLY DOES NOT REVEAL

The public sample demonstrates the quality and usefulness of the finished deliverable without publishing every worksheet, scoring formula, interview tool, internal decision rule or analytical process Mozart uses to produce it.

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REPORT NAVIGATION

Table of Contents

The report moves from diagnosis to prioritization and then to a practical action plan.

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EXECUTIVE DIRECTION
Executive summary, where growth is being lost and recommended strategic direction.

07–08 

CURRENT POSITION
Practice performance, growth trajectory and evidence-based SWOT.

09–12 

ACQUISITION + ACCESS
Patient acquisition, referral ecosystem, leakage, capacity and service-line opportunity.

13–14 

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Geography, North Crossing opportunity and competitive position.

15–21 

DIGITAL + BRAND
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22–24 

THE 10 BIGGEST GROWTH OPPORTUNITIES
Prioritized opportunities with rationale, timing and confidence.

25–27 

ACTION + ACCOUNTABILITY
First 90 days, growth dashboard, methodology, limitations and next steps.

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ABOUT MOZART
Consulting perspective and how to continue the work.

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EXECUTIVE DIRECTION

Executive Summary

Summit Ridge remains a healthy independent orthopedic practice. The immediate challenge is not a lack of demand; it is the practice's ability to capture, route, convert and measure the demand it already generates.

+3.8%
2025 GROWTH
Increase in new patients

−2.6%
JAN–AUG 2026
Year-to-date decline in new patients

−5.2%
RIDGEVIEW
New-patient decline

+4.4%
NORTH CROSSING
New-patient growth

22%
SOURCES VERIFIED
Percentage of referring sources personally verified

CURRENT POSITION

Summit Ridge operates two locations with seven clinical providers, approximately 18,400 annual encounters and roughly 4,200–4,400 completed new-patient visits each year. It has a strong clinical reputation, an established referral base and meaningful capacity in selected services.

KEY STRENGTHS

- Strong clinical reputation
- Established referral base
- Meaningful capacity in selected services
- Two convenient locations
- Experienced provider team

CENTRAL DIAGNOSIS

DEMAND
Referrals, search and patient interest

→

FRICTION
Missed calls, waits, routing and leakage

→

LOST GROWTH
Fewer completed visits and weak attribution

MOZART CONCLUSION

Capture and route existing demand

before materially increasing general advertising.

RECOMMENDED FOCUS

Stabilize access and referral conversion first. Then direct disciplined growth toward sports medicine and North Crossing, where the practice has the clearest available capacity and strategic opportunity.

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EXECUTIVE DIRECTION

Where Growth Is Being Lost

Four connected constraints explain most of Summit Ridge's current growth problem.

01 PATIENT ACCESS



- **31%** of sampled calls missed or abandoned
- No online appointment request
- **19 days** Average new-patient wait
- **11.2%** No-show rate

IMPACT

Qualified patients are not reaching the practice or are waiting too long, leading to leakage.

02 REFERRAL EROSION



- **-11.9%** documented referral decline
- **385 fewer** documented referrals
- **23** previously productive sources inactive
- Prior inactive volume explains ~78% of decline

IMPACT

Fewer referring providers are sending patients, and previously active sources have gone silent.

03 CAPACITY IMBALANCE



- **~40%** North Crossing practical utilization
- Three physicians above 93% utilization
- Limited availability for new patients in certain specialties
- Internal routing can be inconsistent

IMPACT

Demand exceeds available capacity in some areas while other capacity is under-utilized.

04 INCOMPLETE MEASUREMENT



- Limited new-patient attribution
- No consistent source tracking across locations
- Marketing spend not tied to measurable outcomes
- Growth opportunities may be underestimated

IMPACT

Without complete measurement, it is difficult to identify what is working, what isn't and where to focus next.

BOTTOM LINE

The practice is generating demand, but it is losing a meaningful portion of it due to access, referral, capacity and measurement constraints.

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EXECUTIVE DIRECTION

Key Opportunities at a Glance

Our analysis identified 10 prioritized opportunities that can strengthen access, increase referral volume, improve conversion and support sustainable growth across both locations.

THE 10 BIGGEST GROWTH OPPORTUNITIES

High Impact · Medium Impact · Foundational

1	**Improve New-Patient Access** Reduce phone wait times, expand online scheduling and optimize appointment availability to capture existing demand.	Access & Operations
2	**Re-engage Inactive Referral Sources** Target previously active referring providers with personalized outreach, education and streamlined access.	Referral Development
3	**Grow Sports Medicine Volume** Leverage strong local demand for orthopedic and sports-related care through targeted referral outreach and patient education.	Service Line Growth
4	**Strengthen North Crossing Utilization** Increase provider presence, referral awareness and patient access at North Crossing.	Geographic Growth
5	**Capture Local Digital Demand** Improve search visibility, local SEO, website content and online reputation to convert more high-intent patients.	Digital & Brand
6	**Expand Strategic Referral Partnerships** Deepen relationships with high-value primary care, urgent care, PT and specialty practices through targeted outreach and education.	Referral Development
7	**Increase Conversion From Referrals to Scheduled Visits** Streamline referral intake, follow-up and patient communication to reduce leakage.	Patient Conversion
8	**Target High-Growth Geographic Corridors** Focus outreach on North Crossing trade area and surrounding communities where demand and demographics are most favorable.	Market Expansion
9	**Enhance Patient Education and Awareness** Develop clear, consistent messaging for core services, including orthopedic conditions, procedures and non-surgical options.	Marketing & Communications
10	**Implement Ongoing Measurement** Establish dashboards and tracking to monitor referral source performance, digital demand, conversion and overall growth.	Analytics & Performance

STRATEGIC PRIORITY

Focus first on access, referral reactivation and North Crossing, where the greatest near-term opportunity exists.

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CURRENT POSITION

Practice Snapshot at a Glance

Summit Ridge is a well-established, independent orthopedic and sports medicine practice with a strong clinical reputation, two locations and a solid foundation for continued growth.

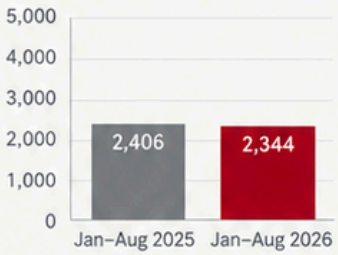
NEW PATIENT VOLUME



+3.8%
2025 GROWTH
Increase in new patients vs. 2024

2026 YEAR-TO-DATE

JANUARY – AUGUST



–2.6%
YTD CHANGE
New patients Jan–Aug 2026 vs. Jan–Aug 2025

PRACTICE OVERVIEW

7
PROVIDERS
Orthopedic surgery, sports medicine and non-surgical care

2
LOCATIONS
Ridgeview and North Crossing

18,400
ANNUAL ENCOUNTERS
Approximately 4,200–4,400 new-patient visits per year

4.7
PATIENT RATING
Strong reputation across online platforms and patient feedback

LOCATIONS



RIDGEVIEW
1234 Ridgeview Drive
Frederick, MD 21701

4 providers
~2,400 new patients/year

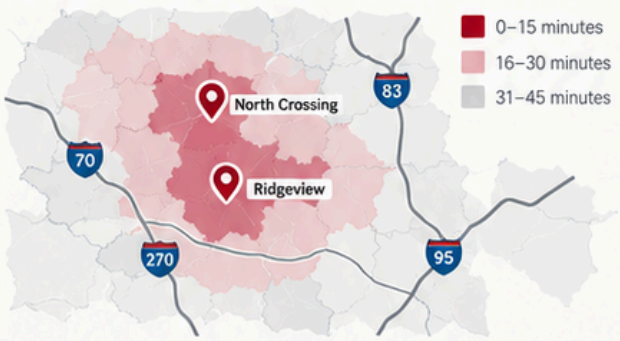


NORTH CROSSING
5678 North Crossing Drive
Frederick, MD 21702

3 providers
~1,800 new patients/year

PATIENT ORIGIN

Primary service area with additional reach into surrounding communities.



KEY TAKEAWAY

Summit Ridge has a strong foundation, consistent demand and clear opportunities to capture more of the market.

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CURRENT POSITION

SWOT Analysis

Summit Ridge has a strong foundation, a solid reputation and clear market opportunities. Addressing key internal challenges and external pressures will be essential to capture more of the existing demand and support long-term growth.

STRENGTHS
WHAT THE PRACTICE DOES WELL

- Strong clinical reputation and experienced providers
- Two convenient locations (Ridgeview and North Crossing)
- Diverse service mix (orthopedic and sports medicine)
- Established referral base and relationships
- Consistent new-patient volume and stable patient ratings
- Modern facilities and advanced treatment options
- Committed, engaged clinical and support teams

WEAKNESSES
INTERNAL AREAS TO IMPROVE

- Missed phone calls and longer hold times
- Limited online appointment availability
- Inactive or underperforming referral sources
- Uneven provider utilization between locations
- Inconsistent tracking and attribution of referral sources
- Limited capacity in certain service lines
- Marketing efforts not fully tied to measurable outcomes

OPPORTUNITIES
AREAS WITH THE GREATEST POTENTIAL

- Improve access and capture more of the existing demand
- Re-engage inactive and low-volume referral sources
- Grow sports medicine and non-surgical orthopedic care
- Increase provider presence and utilization at North Crossing
- Expand digital visibility and local SEO to attract high-intent patients
- Strengthen relationships with primary care, PT and urgent care
- Implement consistent tracking to measure referral and marketing ROI
- Target high-growth geographic areas within the corridor

THREATS
EXTERNAL FACTORS TO MONITOR

- Increased competition from hospital systems and large groups in the region
- Growth of competing orthopedic and urgent care options
- Potential loss of key referring providers due to organizational changes or consolidation
- Payer and reimbursement pressures
- Changing patient expectations for speed, convenience and digital access
- Macroeconomic uncertainty impacting elective procedures
- Ongoing workforce challenges in healthcare

STRATEGIC TAKEAWAY

Leverage the practice's strengths and market opportunities while addressing internal gaps and external pressures.

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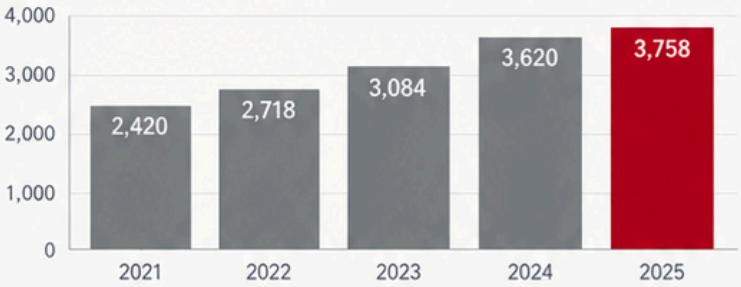


PATIENT ACQUISITION

New Patient Trends and Analysis

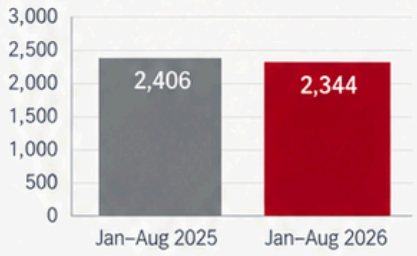
New-patient volume has grown steadily over the past several years, demonstrating consistent demand for Summit Ridge's services. Year-to-date 2026 shows a modest decline compared to the same period in 2025, largely driven by performance at Ridgeview, while North Crossing continues to show strong growth.

TOTAL NEW PATIENTS



YEAR-TO-DATE COMPARISON

JANUARY – AUGUST



-2.6%

YTD CHANGE

New patients Jan–Aug 2026 vs. Jan–Aug 2025

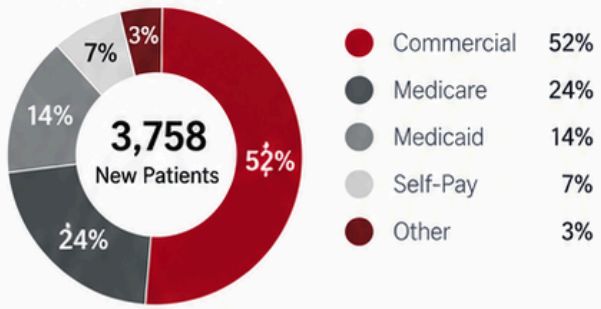
LOCATION PERFORMANCE

Location	2024 New Patients	2025 New Patients	Change	Jan–Aug 2025	Jan–Aug 2026	YTD Change
Ridgeview	2,120	2,139	+0.9%	1,463	1,387	-5.2%
North Crossing	1,500	1,619	+7.9%	943	985	+4.4%
Total	**3,620**	**3,758**	**+3.8%**	**2,406**	**2,344**	**-2.8%**

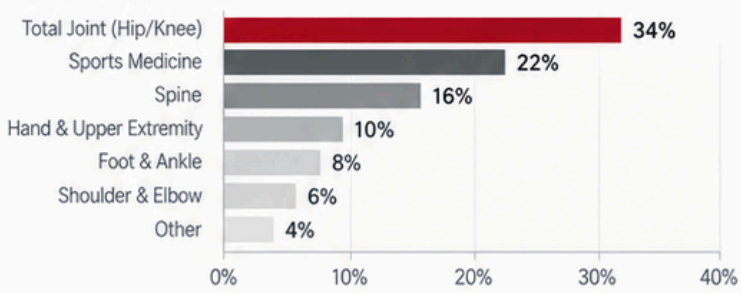
KEY OBSERVATIONS

- Consistent long-term growth from 2021–2025.
- Modest 2.6% decline year-to-date in 2026 compared to 2025.
- Ridgeview is down 5.2% year-to-date, while North Crossing is up 4.4%.
- Total new-patient volume remains well above pre-2023 levels.

PAYOR MIX (2025)



SERVICE LINE MIX (2025)



KEY TAKEAWAY

New-patient volume remains strong, with opportunities to stabilize Ridgeview, build on North Crossing's momentum, and grow high-demand service lines.

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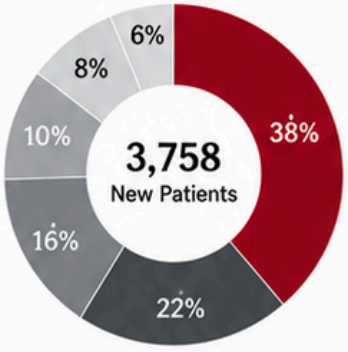


PATIENT ACQUISITION

Referral Ecosystem Analysis

Summit Ridge benefits from a solid network of referring providers across primary care, urgent care, orthopedics, sports medicine and other specialties. However, referral volume is concentrated among a relatively small number of high-performing sources, while a significant number of previously active providers have become inactive or reduced their referral activity.

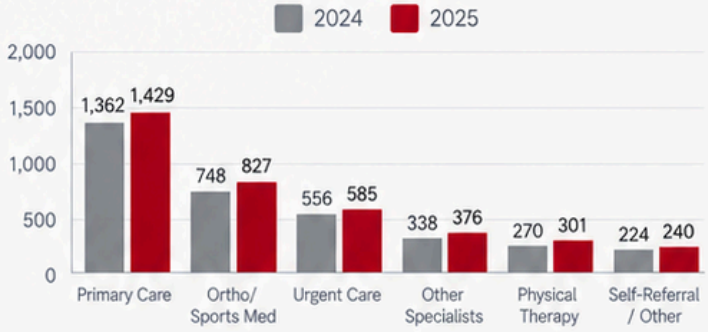
REFERRAL SOURCE MIX (2025)



Primary Care	38%
Orthopedic/Sports Med	22%
Urgent Care	16%
Other Specialists	10%
Physical Therapy	8%
Self-Referral / Other	6%

REFERRAL SOURCE TRENDS

TOTAL REFERRALS (ALL LOCATIONS)



REFERRING PROVIDER STATUS (2021–2026 YTD)

312
Active
Consistent referrals in 2025 and/or 2026

186
Inactive
No referrals in 2025 or 2026, but active in prior years

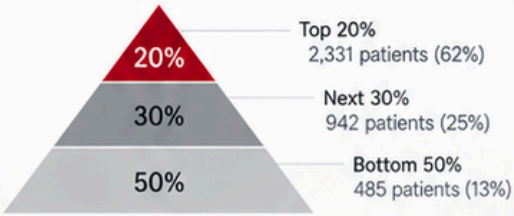
248
New
First referral in 2025 or 2026

TOP REFERRING PROVIDER GROUPS (2025)

Rank	Provider Group	New Patients	% of Total
1	Frederick Family Medicine	412	11.0%
2	Mid-Maryland Orthopedics	298	7.9%
3	Frederick Urgent Care	227	6.0%
4	Capital Sports Medicine	186	4.9%
5	North Crossing Primary Care	174	4.6%

REFERRAL VOLUME CONCENTRATION (2025)

62%
of new patients came from the top 20% of referring providers



INACTIVE / DECLINING SOURCES

45
Previously Active Providers Now Inactive
Referred in at least 2 of 4 years (2021–2024) but no referrals in 2025 or 2026.

68
Active Providers with Declining Volume
20% or greater decline in average annual referrals (2021–2025 vs. 2026 YTD).

KEY TAKEAWAY

Referral volume is concentrated among a small number of high-performing providers. Re-engaging inactive and declining sources represents a significant near-term growth opportunity.

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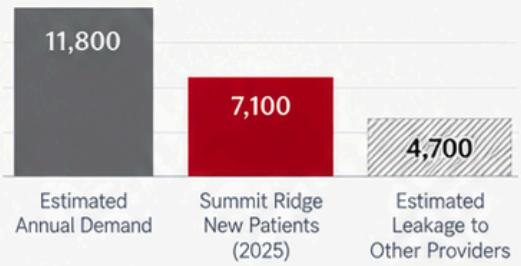
PATIENT ACQUISITION

Access and Leakage Analysis

Summit Ridge captures a significant portion of local demand, but analysis suggests additional growth is possible. A combination of access enhancements, targeted outreach and improved referral conversion could help reduce leakage and keep more patients within the practice.

ESTIMATED MARKET OPPORTUNITY

ORTHOPEDIC AND SPORTS MEDICINE (PRIMARY SERVICE AREA)

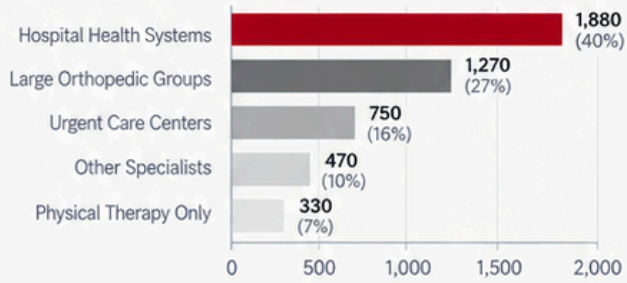




Estimated Market Capture (2025)

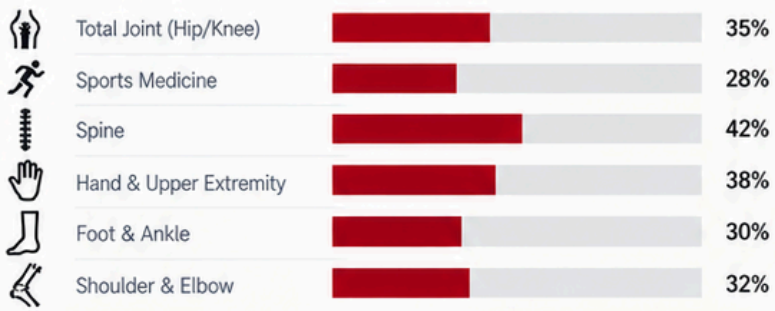
LEAKAGE ANALYSIS

ESTIMATED ANNUAL PATIENTS SEEKING CARE OUTSIDE SUMMIT RIDGE



LEAKAGE BY SERVICE LINE

ESTIMATED PERCENT OF PATIENTS SEEKING CARE OUTSIDE SUMMIT RIDGE



KEY REASONS FOR LEAKAGE

Access and Scheduling
Limited appointment availability, longer wait times and difficulty securing timely appointments.

Referral Patterns
Established relationships with hospital systems and larger orthopedic groups.

Patient Preference
Perceived convenience, brand recognition or existing patient relationships.

Service Line Gaps
Patients seeking certain subspecialty services outside the practice (e.g., spine, complex trauma).

GEOGRAPHIC LEAKAGE

ESTIMATED SHARE OF PATIENTS SEEKING CARE OUTSIDE SUMMIT RIDGE

Geographic Area	Estimated Annual Demand	Summit Ridge Patients (2025)	Estimated Leakage	Leakage Rate
Frederick City	3,500	2,380	1,120	32%
North Frederick County	4,200	2,450	1,750	42%
West Frederick County	2,100	980	1,120	53%
Surrounding Counties	2,000	1,290	710	36%

OPPORTUNITY TO CAPTURE MORE DEMAND

Improve Access
Increase appointment availability, same/next-day options and expanded hours where feasible.

Strengthen Referral Relationships
Target high-leakage providers and specialties with focused outreach and education.

Target High-Leakage Areas
Focus marketing and provider engagement on geographic areas with the greatest opportunity.

KEY TAKEAWAY

Summit Ridge captures an estimated 60% of local demand, leaving meaningful opportunity to reduce leakage and grow volume.

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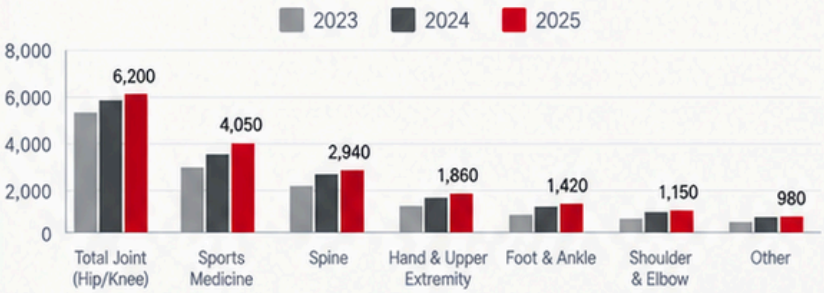
PRACTICE OPERATIONS

Capacity and Service-Line Analysis

Summit Ridge has a well-balanced service mix with opportunities to optimize provider capacity, expand high-growth service lines and improve operational efficiency. Current volumes indicate strong core demand, with particular opportunity in sports medicine, spine and upper extremity services.

ANNUAL ENCOUNTERS BY SERVICE LINE

2023–2025 COMPARISON



SERVICE LINE GROWTH

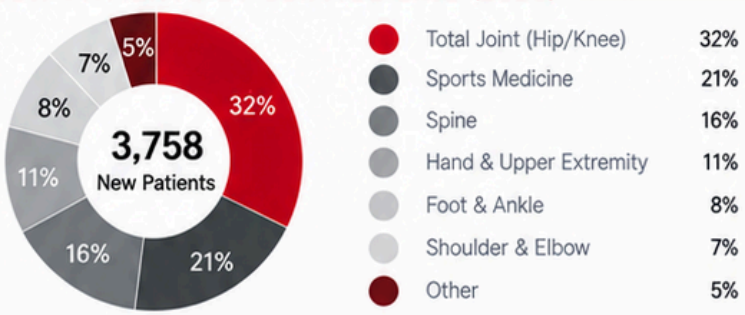
2024–2025

Service Line	2024 Encounters	2025 Encounters	% Change
Total Joint (Hip/Knee)	5,880	6,200	+5.4%
Sports Medicine	3,620	4,050	+11.9%
Spine	2,780	2,940	+5.8%
Hand & Upper Extremity	1,740	1,860	+6.9%
Foot & Ankle	1,350	1,420	+5.2%
Shoulder & Elbow	980	1,150	+17.3%
Other	910	980	+7.7%
Total	**17,780**	**19,600**	**+10.2%**

PROVIDER CAPACITY AND UTILIZATION (2025)

Provider	Specialty Focus	Annual Encounters	Estimated Capacity	Utilization Rate
Dr. Smith	Total Joint / Ortho	3,850	4,200	92%
Dr. Jones	Sports Medicine	3,420	4,000	86%
Dr. Lee	Spine	2,680	3,200	84%
Dr. Patel	Upper Extremity	1,760	2,400	73%
Dr. Garcia	Foot & Ankle	1,390	2,000	70%
Dr. White	General Ortho	2,950	3,600	82%

NEW PATIENTS BY SERVICE LINE (2025)



CAPACITY OPPORTUNITIES

Expand High-Growth Service Lines
Sports medicine, shoulder & elbow and upper extremity show the strongest growth and additional capacity may be warranted.

Optimize Provider Utilization
Several providers are operating below 80% utilization, indicating opportunity to rebalance schedules and increase volume.

Improve Scheduling Efficiency
Evaluate template adjustments, same/next-day access and dedicated urgent care blocks for high-demand service lines.

STRATEGIC CONSIDERATIONS

Align Capacity with Demand
Prioritize additional resources in high-growth service lines.

Consider Recruitment or APP Support
Evaluate adding a subspecialist or advanced practice provider to expand access and reduce wait times.

Monitor Service Line Profitability
Focus on high-value services that align with market demand and practice goals.

Integrate MSK and Non-Surgical Services
Strengthen non-surgical offerings to capture more of the continuum of care.

KEY TAKEAWAY

Summit Ridge has solid overall capacity with clear opportunities to expand high-growth service lines and optimize provider utilization.

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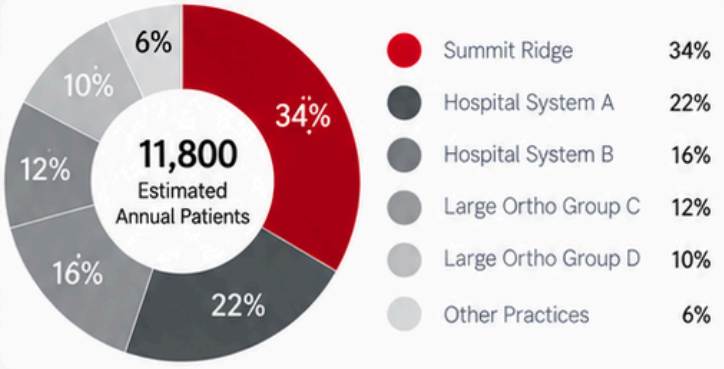
MARKET AND COMPETITIVE LANDSCAPE

Competitor Analysis and Market Position

Summit Ridge operates in a competitive market with several well-established health systems and large orthopedic groups. However, the practice's strong reputation, specialized services and community presence provide a solid foundation to maintain and grow market share, particularly in key service lines.

MARKET SHARE ESTIMATE (ORTHOPEDICS)

PRIMARY SERVICE AREA (2025)



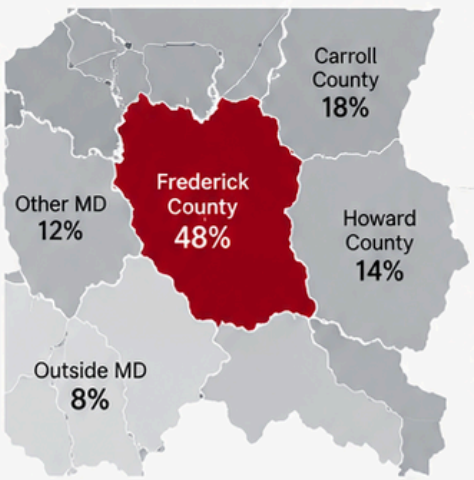
COMPETITOR COMPARISON

KEY DIFFERENTIATORS

Factor	Summit Ridge	Hospital System A	Hospital System B	Large Ortho Group C
Board-Certified Orthopedic Surgeons	★★★★	★★★★	★★★	★★★★
Same/Next-Day Appointments	★★★★	★★	★★	★★★
In-House Imaging	★★★★	★★★★	★★★	★★★
Sports Medicine Specialization	★★★★	★★★	★★	★★★
Community Presence	★★★★	★★★	★★★	★★
Patient Satisfaction	★★★★	★★★	★★★	★★★

PATIENT ORIGIN ANALYSIS (2025)

WHERE SUMMIT RIDGE PATIENTS LIVE



TOP ZIP CODES (NEW PATIENTS)

1	21701	8.6%
2	21702	7.3%
3	21703	5.9%
4	21704	4.8%
5	21711	4.1%
6	21042	3.6%
7	21043	3.2%
8	21157	2.9%
9	21769	2.6%
10	21758	2.4%

COMPETITIVE STRENGTHS AND CHALLENGES

STRENGTHS

- Strong local reputation and long history
- Established provider relationships
- Convenient access and shorter wait times
- Comprehensive service mix
- High patient satisfaction
- Community involvement and visibility

CHALLENGES

- Larger hospital systems with more resources
- Aggressive marketing by competing orthopedic groups
- Expansion of urgent care orthopedics in the region
- Recruitment and retention of specialty providers
- Price transparency and bundled care models
- Growing non-surgical and conservative care options

KEY TAKEAWAY

Summit Ridge holds a strong market position with clear differentiators, but ongoing competition requires continued focus on access, service excellence and strategic growth.

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DIGITAL PRESENCE

Online Visibility and Performance

Summit Ridge has a solid digital foundation, but there are meaningful opportunities to increase visibility, improve search performance and convert more website traffic into new patient appointments.

WEBSITE PERFORMANCE (2024–2025)

48,320	112,450	2:18	52%
Users	Page Views	Avg. Session Duration	Bounce Rate
+12% vs. 2024	+18% vs. 2024	+9% vs. 2024	-6% vs. 2024

TOP WEBSITE PAGES (2025)

Rank	Page	Page Views	% of Total
1	Home	28,450	25%
2	Knee (Joint Replacement)	16,220	14%
3	Sports Medicine	12,480	11%
4	Orthopedic Services	9,310	8%
5	Provider Profiles	8,750	8%
6	Locations	7,640	7%
7	Spine	6,920	6%
8	Shoulder & Elbow	5,880	5%
9	Patient Resources	4,630	4%
10	Contact / Appointments	4,210	4%

GOOGLE BUSINESS PROFILE (2025)



4.6 ★★★★½
Average Rating
(1,124 Reviews)

Profile Views	62,400	+28%	vs. 2024
Direction Requests	11,820	+22%	vs. 2024
Phone Calls	8,970	+18%	vs. 2024
Website Clicks	14,350	+26%	vs. 2024

SEARCH ENGINE VISIBILITY

GOOGLE RANKINGS (FREDERICK COUNTY)

Keyword	Current Position	Previous Position	Change
orthopedic surgeon frederick md	#3	#5	↑ 2
knee replacement frederick md	#4	#6	↑ 2
sports medicine frederick md	#5	#8	↑ 3
shoulder surgeon frederick md	#6	#9	↑ 3
spine surgeon frederick md	#7	#10	↑ 3
orthopedic urgent care frederick md	#4	#7	↑ 3
joint replacement frederick md	#5	#8	↑ 3

TRAFFIC SOURCES (2025)



OPPORTUNITIES FOR IMPROVEMENT

SEO Expansion
Target additional high-intent keywords (e.g., hip, elbow, foot/ankle) to capture more organic traffic.

Content Development
Add educational content, FAQs and condition-specific pages to improve search visibility and patient engagement.

Local SEO
Strengthen Google Business Profile with more photos, patient reviews and regular updates.

Conversion Optimization
Simplify appointment requests, highlight urgent access and add clear calls to action throughout the site.

KEY TAKEAWAY

Summit Ridge has a strong digital presence, but targeted SEO, expanded content and conversion improvements can drive significantly more patient inquiries and new appointments.

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FINANCIAL AND OPERATIONAL PERSPECTIVE

Growth Opportunities and Strategic Priorities

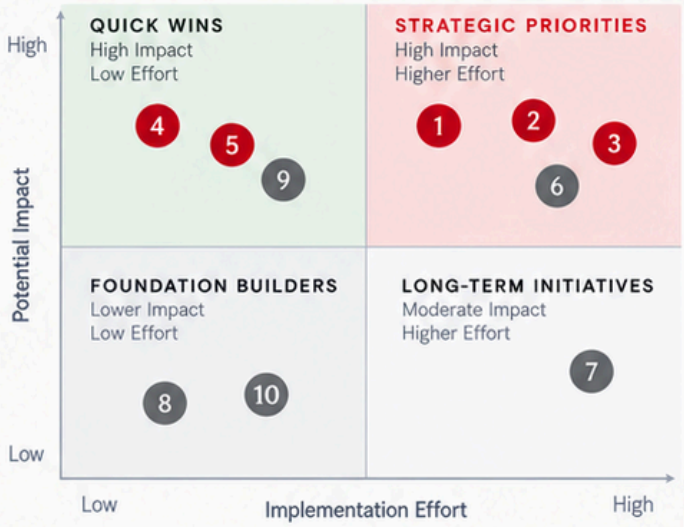
Based on our analysis of current performance, market dynamics and patient demand, we have identified ten key opportunities that can help Summit Ridge increase patient volume, strengthen referral relationships and position the practice for long-term growth.

TOP 10 GROWTH OPPORTUNITIES

1. **Optimize referral relationships** with top primary care and orthopedic groups.
2. **Capture leakage** through targeted outreach and access improvements.
3. **Expand high-growth service lines** (sports medicine, shoulder & elbow, upper extremity).
4. **Increase digital visibility** and search engine rankings.
5. **Enhance patient access** with same/next-day appointments.
6. **Grow market share** in Frederick County and surrounding areas.
7. **Improve provider capacity** and utilization.
8. **Strengthen patient education** and awareness efforts.
9. **Leverage online reviews** and patient testimonials.
10. **Explore strategic partnerships** and community engagement.

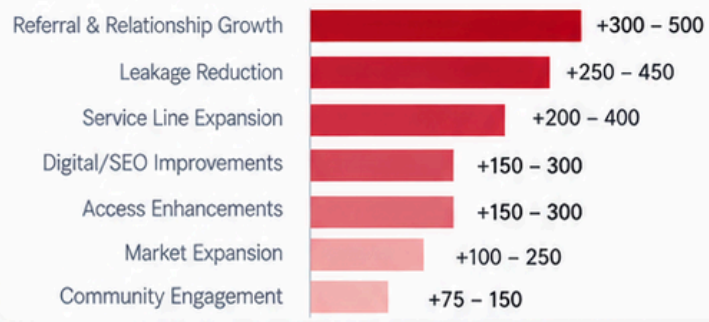
OPPORTUNITY IMPACT MATRIX

PRIORITIZATION BASED ON POTENTIAL IMPACT AND IMPLEMENTATION EFFORT



EXPECTED IMPACT

ESTIMATED INCREMENTAL NEW PATIENTS (ANNUAL IMPACT RANGE)



PRIORITIZED ACTION PLAN

Priority	Initiative	Timeframe	Impact
1	Strengthen top referral relationships	0–6 months	High
2	Improve access and scheduling	0–6 months	High
3	Enhance digital visibility and SEO	0–6 months	High
4	Target leakage and recapture patients	6–12 months	High
5	Expand high-growth service lines	6–12 months	High
6	Optimize provider capacity	6–12 months	Medium
7	Grow market share in key geographies	6–12 months	Medium
8	Strengthen patient education	6–12 months	Medium
9	Leverage patient reviews	Ongoing	Medium
10	Explore strategic partnerships	6–18 months	Medium

KEY TAKEAWAY

Implementing these targeted opportunities can drive meaningful growth in new patient volume, strengthen market position and support Summit Ridge's long-term success.

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THE ROAD AHEAD

Recommendations and Next Steps

Summit Ridge is well positioned for continued growth. By focusing on the highest-impact opportunities and executing a structured plan, the practice can increase patient volume, strengthen referral relationships and maximize its market position.

STRATEGIC RECOMMENDATIONS

FOCUS AREA AND KEY ACTIONS

1. **Strengthen Referral Relationships**
   - Target top orthopedists, PCPs and sports medicine providers
   - Implement structured outreach and education program
2. **Improve Access and Reduce Leakage**
   - Expand same/next-day appointment availability
   - Increase outreach to patients seeking care outside the practice
3. **Expand High-Growth Service Lines**
   - Focus on sports medicine, shoulder & elbow, and spine
   - Evaluate adding a subspecialist to increase capacity
4. **Increase Digital Visibility**
   - Improve SEO and target high-intent keywords
   - Add educational content and patient resources
5. **Optimize Provider Capacity**
   - Monitor utilization and rebalance schedules
   - Align resources with highest-demand services

IMPLEMENTATION TIMELINE

PHASED APPROACH FOR MAXIMUM IMPACT

1 PHASE 1 – FOUNDATION (0–3 MONTHS)
- ✓ Prioritize and engage top referral targets
- ✓ Launch access and scheduling improvements
- ✓ Begin SEO enhancements and content development

2 PHASE 2 – EXPANSION (4–6 MONTHS)
- ✓ Execute targeted outreach and education campaign
- ✓ Expand high-growth service lines
- ✓ Monitor provider utilization and adjust schedules

3 PHASE 3 – GROWTH (7–12 MONTHS)
- ✓ Evaluate additional provider recruitment or APP support
- ✓ Scale digital marketing and patient education efforts
- ✓ Measure results and refine strategies

SUCCESS METRICS

KEY INDICATORS TO TRACK PROGRESS

Metric	Current (2025)	12-Month Target	Measurement Method
New Patients	7,100	+10–15%	EHR / Monthly Report
Referral Volume	Baseline	+15–20%	Referral Tracking
Website Traffic	48,320 users	+25%	Google Analytics
Online Conversions	Baseline	+20%	Appointment Requests
Provider Utilization	Avg. 78%	85–90%	Scheduling Reports
Patient Satisfaction	4.6 stars	≥ 4.7 stars	Google Reviews / Surveys

PARTNERSHIP AND SUPPORT

HOW MOZART CAN HELP

STRATEGIC GUIDANCE
Ongoing analysis, market intelligence and prioritization to keep the practice focused on high-value opportunities.

EXECUTION SUPPORT
Development of marketing materials, provider outreach, digital content and patient education resources.

PERFORMANCE MONITORING
Regular reporting and analysis to measure progress and adjust strategies as needed.

FRACTIONAL MARKETING AND BD SUPPORT
An extension of your team to maintain momentum and drive long-term growth.

KEY TAKEAWAY

With a clear strategy, focused execution and ongoing partnership, Summit Ridge can capture significant growth and further strengthen its position as a leading orthopedic and sports medicine practice.

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EXECUTIVE SUMMARY

Key Findings and Recommendations

Summit Ridge Orthopedic & Sports Medicine has a strong foundation, a respected reputation and meaningful opportunities to increase patient volume, strengthen referral relationships and expand high-growth service lines. This audit identifies 10 prioritized opportunities and a clear path forward to achieve measurable growth.

PRACTICE STRENGTHS

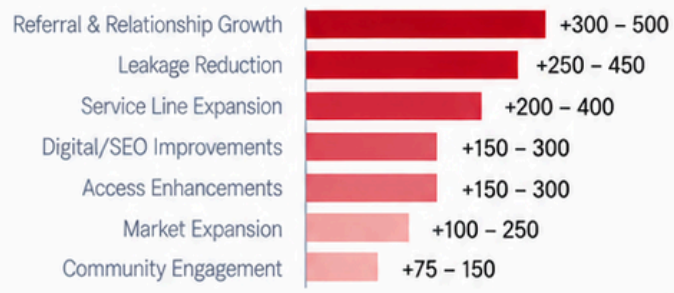
- Strong local reputation and long history
- Established provider relationships
- Convenient access and shorter wait times
- Comprehensive service mix
- High patient satisfaction
- Community involvement and visibility

MARKET POSITION

Summit Ridge holds a strong position in the Frederick County market, with a well-rounded service mix and high patient satisfaction. Continued focus on access, referral relationships, digital visibility and high-growth service lines can further strengthen its market share and long-term success.

GROWTH POTENTIAL

ESTIMATED INCREMENTAL NEW PATIENTS (ANNUAL RANGE)



KEY OPPORTUNITIES

1. **Optimize referral relationships** with top primary care and orthopedic groups
2. **Capture leakage** through targeted outreach and access improvements
3. **Expand high-growth service lines** (sports medicine, shoulder & elbow, upper extremity)
4. **Increase digital visibility** and search engine rankings
5. **Enhance patient access** with same/next-day appointments
6. Grow market share in Frederick County and surrounding areas
7. Improve provider capacity and utilization
8. Strengthen patient education and awareness efforts
9. Leverage online reviews and patient testimonials
10. Explore strategic partnerships and community engagement

12-MONTH TARGETS

KEY INDICATORS TO TRACK PROGRESS

Metric	Current (2025)	12-Month Target	Measurement Method
New Patients	7,100	+10–15%	EHR / Monthly Report
Referral Volume	Baseline	+15–20%	Referral Tracking
Website Traffic	48,320 users	+25%	Google Analytics
Online Conversions	Baseline	+20%	Appointment Requests
Provider Utilization	Avg. 78%	85–90%	Scheduling Reports
Patient Satisfaction	4.6 stars	≥ 4.7 stars	Google Reviews / Surveys

KEY TAKEAWAY

By executing these prioritized opportunities, Summit Ridge can drive meaningful growth, enhance patient access and solidify its position as a leading orthopedic and sports medicine practice.

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CONCLUSION

A Strong Foundation for Continued Growth

Summit Ridge Orthopedic & Sports Medicine is a respected, established practice with a strong reputation, dedicated providers and a meaningful opportunity to increase patient volume, expand referral relationships and grow high-value service lines. By executing the recommended strategies, the practice can strengthen its market position and achieve measurable, long-term growth.

CLEAR OPPORTUNITIES

Ten prioritized opportunities can drive new patient volume, improve referral relationships and expand high-growth service lines.

MEASURABLE IMPACT

Targeted improvements in access, digital visibility, and outreach can generate meaningful, measurable results over the next 12 months and beyond.

STRATEGIC ADVANTAGE

Summit Ridge's reputation, provider expertise and comprehensive service mix provide a strong platform to capitalize on market opportunities.

LONG-TERM SUCCESS

With a focused strategy and consistent execution, Summit Ridge can continue to strengthen its position as a leading orthopedic and sports medicine practice in Frederick County and the surrounding region.

OVERALL RECOMMENDATION

Move forward with a focused, phased implementation plan to capture the highest-impact opportunities, build on current strengths and achieve sustainable growth in the years ahead.

NEXT STEPS

1. **REVIEW AND DISCUSS**
   Walk through the audit findings and recommendations to align on priorities and any additional insights.
2. **DEVELOP DETAILED PLAN**
   Create a customized implementation roadmap with timelines, responsibilities and success metrics.
3. **BEGIN EXECUTION**
   Launch initial priority initiatives and establish ongoing monitoring to track progress and measure results.

HOW MOZART CAN HELP

Mozart Consulting & Communications partners with independent healthcare practices to turn insight into measurable growth. We provide strategic guidance, marketing and communications support, content creation and digital solutions—amplified by AI—to help you attract more patients, strengthen referral relationships and build a stronger, more visible brand.

- Strategic Guidance
- Marketing & Communications
- Content Creation
- Digital & AI Solutions

THANK YOU

Thank you for the opportunity to prepare this Growth Audit. We look forward to the possibility of helping Summit Ridge achieve its growth goals.

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APPENDIX

Data, Definitions and Methodology

This appendix provides additional information about the data sources, assumptions, definitions and methodology used in this Healthcare Growth Audit. It is intended to add context and transparency to the analysis and recommendations presented in this report.

PRIMARY DATA SOURCES

SOURCES USED FOR THIS ANALYSIS

Practice Data
Patient volumes, service lines, provider productivity and access metrics provided by Summit Ridge (2023–2025).

Market Research
Demographic, competitive and market trend data from industry sources (e.g., Claritas, ESRI, IBISWorld).

Online Presence
Website analytics, Google Business Profile data, search engine rankings and online reviews (2025).

Referral Ecosystem
Analysis of referral sources, provider network mapping and public directory data.

Industry Benchmarks
Relevant benchmarks from MGMA, AAOS, Becker's Orthopedic, and other industry publications.

KEY ASSUMPTIONS

ASSUMPTIONS USED IN THIS ANALYSIS

1. **Market Growth**
Local market demand for orthopedic and sports medicine is expected to continue growing, driven by an aging population and increased participation in active lifestyles.

2. **Service Capacity**
The practice has the clinical and operational capacity to support additional patient volume with appropriate resource allocation and process improvements.

3. **Referral Responsiveness**
Targeted outreach and access improvements will lead to increased referrals from primary care, orthopedic and sports medicine providers.

4. **Patient Behavior**
Patients will continue to use online search, reviews and provider recommendations as key factors in choosing an orthopedic and sports medicine practice.

5. **Implementation**
Recommendations are achievable within the proposed timelines, assuming organizational alignment and adequate resources.

KEY DEFINITIONS

TERMS USED IN THIS REPORT

New Patient	A patient with no prior visit to the practice in the previous three years.
Referral Volume	Number of new patients referred by external providers or organizations.
Service Line	A specific clinical area (e.g., joint replacement, sports medicine, spine, shoulder & elbow).
Patient Leakage	Patients within the service area seeking care outside the practice for orthopedic or related services.
Provider Utilization	Percentage of available clinical capacity used for patient appointments.
Online Conversion	Percentage of website visitors who take a desired action (e.g., request an appointment, call or complete a form).
Market Share	The practice's share of total orthopedic and sports medicine patients within the defined service area.

ACRONYMS

COMMONLY USED ACRONYMS IN THIS REPORT

AAOS	American Academy of Orthopaedic Surgeons
APP	Advanced Practice Provider
EHR	Electronic Health Record
ESI	Epidemiological Services, Inc.
ESRI	Environmental Systems Research Institute
GAE	Genicular Artery Embolization
MGMA	Medical Group Management Association
MSK	Musculoskeletal
PCP	Primary Care Provider
SEO	Search Engine Optimization
TKR	Total Knee Replacement
YTD	Year to Date

NOTE
This analysis is based on the best available data at the time of preparation. Actual results may vary based on market conditions, operational changes and other factors beyond the control of Mozart Consulting & Communications.

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Disclaimers and Next Steps

This Healthcare Growth Audit was prepared for educational and strategic planning purposes only. The analysis, findings and recommendations are based on information available at the time of preparation and are not a guarantee of future results.

IMPORTANT DISCLAIMERS

Information Sources
This report is based on data provided by Summit Ridge, publicly available information and third-party sources believed to be reliable. While reasonable efforts have been made to ensure accuracy, Mozart Consulting & Communications cannot guarantee the completeness or accuracy of all information.

Forward-Looking Statements
The projections, estimates and potential impact ranges presented in this report are based on current market conditions and assumptions. Actual results may vary and are not guaranteed.

Not Financial, Legal or Medical Advice
This report does not constitute financial, legal, tax or medical advice. Summit Ridge should consult with appropriate professional advisors before making business, financial or clinical decisions.

Use of This Report
This report is intended solely for the internal use of Summit Ridge Orthopedic & Sports Medicine. It may not be reproduced, distributed or used for other purposes without the written consent of Mozart Consulting & Communications.

NEXT STEPS

1. **Review and Discuss**
   Meet with key stakeholders to review the findings, prioritize opportunities and discuss any additional insights or questions.
2. **Develop a Customized Plan**
   Create a detailed implementation roadmap with timelines, responsibilities and success metrics based on the prioritized opportunities.
3. **Begin Execution**
   Launch initial initiatives and establish regular monitoring to track progress and measure results.
4. **Ongoing Support**
   Mozart Consulting & Communications can provide strategic guidance, marketing and communications support, content creation and digital solutions to help Summit Ridge execute this plan and achieve its growth goals.

CONTACT INFORMATION

FOR QUESTIONS OR TO DISCUSS NEXT STEPS

MOZART Consulting & Communications

301-514-6460
dnoble@mozartconsultinggroup.com
mozartconsultinggroup.com

THANK YOU

A PARTNER IN YOUR SUCCESS

Thank you to the Summit Ridge team for the opportunity to conduct this Healthcare Growth Audit. We appreciate your trust and look forward to the possibility of supporting your continued growth and success.

FINAL THOUGHT

With a clear strategy, focused execution and the right partner, Summit Ridge can build on its strong foundation and achieve significant growth in the years ahead.

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About Mozart Consulting & Communications

Mozart Consulting & Communications helps independent healthcare practices turn insight into measurable growth. We combine strategic thinking, marketing and communications expertise, content creation and digital solutions—amplified by AI—to help you attract more patients, strengthen referral relationships and build a stronger, more visible brand in your community.

OUR SERVICES

A COMPLETE SOLUTION TO SUPPORT YOUR GROWTH

STRATEGIC CONSULTING

Identify opportunities, overcome challenges and build a roadmap for growth.

MARKETING & COMMUNICATIONS

Strengthen relationships and reach the audiences that matter most.

CONTENT CREATION

Tell your story through video, editorial content and design.

DIGITAL & AI SOLUTIONS

Leverage AI-driven insights and digital tools to work smarter and grow faster.

ONGOING SUPPORT

Gain an extension of your team—from strategic guidance to day-to-day execution.

WHY HEALTHCARE PRACTICES CHOOSE MOZART

PRACTICAL EXPERIENCE. STRATEGIC THINKING. REAL RESULTS.

HEALTHCARE FOCUS

Deep understanding of independent practices and the unique growth opportunities and challenges you face.

STRATEGY BEFORE EXECUTION

We diagnose, develop a plan and execute with purpose—so your time and resources deliver maximum impact.

AI AS A STRATEGIC ADVANTAGE

We leverage AI to amplify insight, creativity, efficiency and analysis—enhancing your expertise, not replacing it.

PRACTICAL, REAL-WORLD EXPERIENCE

Decades of marketing, communications and business development experience across healthcare, legal and professional services.

MEASURABLE RESULTS

Clear strategies, actionable recommendations and trackable outcomes that help you grow.

A TRUE PARTNER

We work as an extension of your team, providing the support you need to maintain momentum and achieve long-term success.

OUR MISSION

Help healthcare practices achieve meaningful, measurable growth.

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Contact Information and Next Steps

We appreciate the opportunity to conduct this Healthcare Growth Audit for Summit Ridge Orthopedic & Sports Medicine. Please feel free to reach out with any questions, to discuss the findings in more detail or to explore how Mozart Consulting & Communications can support your next phase of growth.

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Frederick, Maryland

PRIMARY CONTACT

David Noble

Principal
Mozart Consulting & Communications

I'm here to help you turn insight into action. Whether you have questions about the audit, would like to discuss specific recommendations, or want to explore ongoing support, I look forward to continuing the conversation.

- DISCUSS FINDINGS
- EXPLORE OPPORTUNITIES
- PLAN NEXT STEPS

RECOMMENDED NEXT STEPS

A PHASED APPROACH TO TURN INSIGHT INTO MEASURABLE RESULTS

1

REVIEW AND DISCUSS

Walk through the audit findings and recommendations to align on priorities and any additional insights.

1–2 WEEKS

2

DEVELOP DETAILED PLAN

Create a customized implementation roadmap with timelines, responsibilities and success metrics.

2–4 WEEKS

3

BEGIN EXECUTION

Launch initial priority initiatives and establish ongoing monitoring to track progress.

1–3 MONTHS

4

ONGOING SUPPORT

Provide strategic guidance, marketing and communications support, content creation and digital solutions to maintain momentum and drive results.

ONGOING

LET'S TALK

Turn insight into action.

I look forward to the opportunity to continue the conversation and help Summit Ridge achieve its growth goals.

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Additional Resources and Tools

The following resources provide additional insights, tools and information that may be helpful as you evaluate opportunities and implement the recommendations from this Healthcare Growth Audit.

RECOMMENDED RESOURCES

INDUSTRY REPORTS, TOOLS AND REFERENCES

Ortho/Sports Medicine Industry Outlook

Key trends, market projections and growth opportunities in orthopedic and sports medicine.

SCAN TO LEARN MORE

Patient Engagement Best Practices

Strategies to improve online visibility, patient experience and long-term engagement.

SCAN TO LEARN MORE

Digital Marketing for Healthcare

Practical guidance on website optimization, local SEO, content and online reputation management.

SCAN TO LEARN MORE

Referral Development Toolkit

Templates and strategies to strengthen relationships with primary care and specialty referring providers.

SCAN TO LEARN MORE

Practice Operations Resources

Insights on access, scheduling, capacity optimization and operational efficiency.

SCAN TO LEARN MORE

AI in Healthcare Marketing

Real-world applications of AI to improve marketing, streamline workflows and drive practice growth.

SCAN TO LEARN MORE

KEEP EXPLORING

Knowledge fuels growth.

These resources can help you and your team dive deeper into key topics and support the successful execution of your growth strategy.

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Glossary of Terms and Definitions

The following definitions are provided to ensure clarity and a common understanding of key terms used throughout this Healthcare Growth Audit.

TERM	DEFINITION
New Patient Volume	The number of unique patients seen for the first time in a defined period, typically used to measure growth.
Referral Source	A provider, practice or organization that refers patients to your practice (e.g., primary care, specialists, urgent care, imaging centers).
Referral Conversion Rate	The percentage of referred patients who schedule and complete an appointment with your practice.
Service Area	The geographic area from which your patients come, typically defined by ZIP codes or drive time.
Patient Leakage	Patients in your market area who seek care from competing providers instead of your practice.
Target Audience	The specific patient populations you aim to reach, based on demographics, conditions, lifestyle and other characteristics.
Market Share	The percentage of total patients in your service area who choose your practice for care, compared to competitors.

TERM	DEFINITION
Primary Care Provider (PCP)	A physician who provides general medical care and often serves as a key referral source for specialty services.
Service Line	A specific clinical area of care offered by your practice (e.g., joint replacement, sports medicine, spine, orthopedic trauma).
Capacity	The ability of your practice to see additional patients, based on provider availability, clinic schedule and operational resources.
Access	How quickly and easily patients can get an appointment and receive care, including scheduling availability and time to be seen.
Digital Presence	Your online visibility, including website, search engine rankings, online reviews, directory listings and social media.
SEO (Search Engine Optimization)	Strategies used to improve your website's visibility in search engine results for relevant keywords and search terms.
Patient Engagement	Strategies and touchpoints that build awareness, trust and ongoing communication with current and future patients.

COMMON LANGUAGE. CLEARER INSIGHTS.

A shared understanding drives better decisions.

These definitions help ensure alignment and make it easier to turn insight into action.

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Sources and References

The following sources were used to develop the analysis, insights and recommendations in this Healthcare Growth Audit. These resources provide industry data, market intelligence and best practices relevant to orthopedic and sports medicine practices.

Industry Reports and Market Research

- IBISWorld – Orthopedic & Sports Medicine Practices Industry Report
- Frost & Sullivan – U.S. Musculoskeletal Health Market Forecast
- Grand View Research – Orthopedic Devices and Services Market Analysis
- MarketsandMarkets – Sports Medicine Market Outlook
- Advisory Board – Orthopedic Practice Trends and Benchmarks
- MGMA – Medical Practice Operations and Financial Benchmarks

Patient Behavior and Consumer Trends

- Pew Research Center – Healthcare Consumer Trends
- Kyruus – Patient Access and Appointment Scheduling Insights
- Google – Healthcare Consumer Search Behavior
- Think with Google – Healthcare Marketing Insights
- Nielsen – Health and Wellness Consumer Trends
- Zocdoc – Patient Appointment Booking Trends

Digital Marketing and SEO

- Google Search Central – SEO Best Practices for Healthcare
- Semrush – Healthcare SEO Benchmark Data
- BrightLocal – Online Reviews and Reputation Management
- HubSpot – Healthcare Marketing Strategy Guides
- Hootsuite – Social Media Benchmarks for Healthcare
- WordStream – PPC Best Practices for Healthcare

Healthcare Policy and Regulation

- Centers for Medicare & Medicaid Services (CMS)
- American Medical Association (AMA)
- American Academy of Orthopaedic Surgeons (AAOS)
- American Orthopaedic Society for Sports Medicine (AOSSM)
- U.S. Bureau of Labor Statistics – Healthcare Workforce Data
- Maryland Health Services Cost Review Commission (HSCRC)

Geographic and Demographic Data

- U.S. Census Bureau – Demographic and Population Data
- Esri – Market Potential and Trade Area Analysis
- Claritas – Consumer Segmentation Data
- Maryland Department of Planning – Population Projections
- Community Commons – Health Indicators and Social Determinants of Health
- Dattassential – Lifestyle and Consumer Behavior Data

Best Practices and Thought Leadership

- Kareo – Independent Practice Growth Resources
- American College of Healthcare Executives (ACHE)
- Healthcare Financial Management Association (HFMA)
- Medical Group Management Association (MGMA) – Practice Growth Strategies
- Becker's Healthcare – Orthopedic Industry Insights
- Fierce Healthcare – Outpatient Care and Access Trends

DATA-DRIVEN INSIGHTS. ACTIONABLE STRATEGIES.

Trusted sources. Real-world perspective.

These sources helped inform the analysis and recommendations in this report, ensuring a comprehensive and credible assessment of opportunities for growth.

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Thank You and Next Steps

Thank you for the opportunity to conduct this Healthcare Growth Audit for Summit Ridge Orthopedic & Sports Medicine. We appreciate your time, insights and collaboration throughout this process and look forward to the possibility of supporting your continued growth.

KEY TAKEAWAYS
A CLEAR PATH FORWARD

Meaningful Opportunities
There are clear, actionable opportunities to strengthen patient acquisition, referral relationships, digital presence and service-line growth.

A Strategic Roadmap
The recommendations in this audit provide a practical, phase-based approach to help Summit Ridge achieve measurable growth.

Real-World Impact
Implementing these strategies can lead to increased patient volume, stronger referral relationships and a more visible, competitive brand in your market.

A True Partner
Mozart Consulting & Communications is ready to support your team—whether through strategy, execution or ongoing marketing and communications support.

> "Every practice has untapped potential. With the right insight, strategy and execution, that potential becomes real, measurable growth."

DAVID NOBLE
PRINCIPAL
MOZART CONSULTING & COMMUNICATIONS

LET'S CONTINUE THE CONVERSATION
WE'RE HERE TO HELP

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OUR MISSION
Help healthcare practices achieve meaningful, measurable growth.

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About Mozart Consulting & Communications

STRATEGY. CREATIVITY. REAL-WORLD RESULTS.

Mozart Consulting & Communications helps independent healthcare practices, law firms and other professional services organizations identify opportunities, strengthen their market position and achieve measurable growth through strategic consulting, marketing, communications, content creation and digital solutions.

Strategic Perspective

We diagnose opportunities, develop practical strategies and create roadmaps for growth.

Creative Solutions

We bring fresh ideas and innovative approaches to help you stand out in a competitive market.

Practical Execution

We turn strategy into action with clear plans, compelling content and measurable results.

AI-Powered Advantage

We leverage AI to amplify insight, creativity, efficiency, analysis and execution across all of our services.

A True Partner

We work as an extension of your team, providing ongoing support to help you maintain momentum and achieve your goals.

OUR VALUES

Integrity
Honest advice and a focus on what's best for your practice.

Results
Measurable outcomes that make a real difference.

Collaboration
A true partnership approach, aligned with your goals.

Innovation
Forward-thinking solutions that keep you ahead.

OUR SERVICES

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- Marketing & Communications
- Content Creation
- Digital & AI Solutions
- Ongoing Support

OUR COMMITMENT

Insight. Strategy. Execution. Real Results.

We are committed to helping healthcare practices and other professional organizations achieve meaningful, measurable growth.

MOZART
Consulting & Communications

INSIGHT.
STRATEGY.
EXECUTION.
REAL RESULTS.



APPENDIX

Let's Build What's Next

INSIGHT. STRATEGY. EXECUTION. REAL RESULTS.

Thank you again for the opportunity to conduct this Healthcare Growth Audit for Summit Ridge Orthopedic & Sports Medicine. We hope this analysis provides valuable insights and a clear path forward for continued growth.

We look forward to the possibility of supporting your team and helping you turn these opportunities into measurable results.

CONTACT US

LET'S TALK ABOUT YOUR GOALS.

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Frederick, Maryland

> "Strategy transforms insight into opportunity and opportunity into measurable growth."

DAVID NOBLE
PRINCIPAL
MOZART CONSULTING & COMMUNICATIONS

OUR PURPOSE

Help organizations see what's possible, create a plan to get there, and make it happen.

INSIGHT.
STRATEGY.
EXECUTION.
REAL RESULTS.