Connecting the Dots

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Consultations, Seminars, Speaking Engagements, and Educational and Training Materials

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New Patient Coordinator & Marketing Workshop

December 6, 2019 | New York, NY

Jay Suites Times Square

Mastering Practice Management Workshop

December 7, 2019 | New York, NY

Jay Suites Times Square



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**SCHEDULING**

LACK OF SYSTEMS AND STANDARDS RESULT IN:

1.

2.

HOW EVERYONE PLAYS A ROLE IN MAKING THE SCHEDULE WORK:

|  |
| --- |
| **DOCTOR**: |
| **BUS. STAFF:** |
| **NEW PT COORD:** |
| **ASSISTANTS:** |

CLINICAL SYSTEMS

LACK OF SYSTEMS AND STANDARDS RESULT IN:

1.

2.

HOW EVERYONE PLAYS A ROLE IN MAKING THE SCHEDULE WORK:

|  |
| --- |
| **DOCTOR**: |
| **BUS. STAFF:** |
| **NEW PT COORD:** |
| **ASSISTANTS:** |

NEW PATIENT PROCESS

LACK OF SYSTEMS AND STANDARDS RESULT IN:

1.

2.

HOW EVERYONE PLAYS A ROLE IN MAKING THE SCHEDULE WORK:

|  |
| --- |
| **DOCTOR**: |
| **BUS. STAFF:** |
| **NEW PT COORD:** |
| **ASSISTANTS:** |

COLLECTION SYSTEM

LACK OF SYSTEMS AND STANDARDS RESULT IN:

1.

2.

HOW EVERYONE PLAYS A ROLE IN MAKING THE SCHEDULE WORK:

|  |
| --- |
| **DOCTOR**: |
| **BUS. STAFF:** |
| **NEW PT COORD:** |
| **ASSISTANTS:** |

MARKETING SYSTEM

LACK OF SYSTEMS AND STANDARDS RESULT IN:

1.

2.

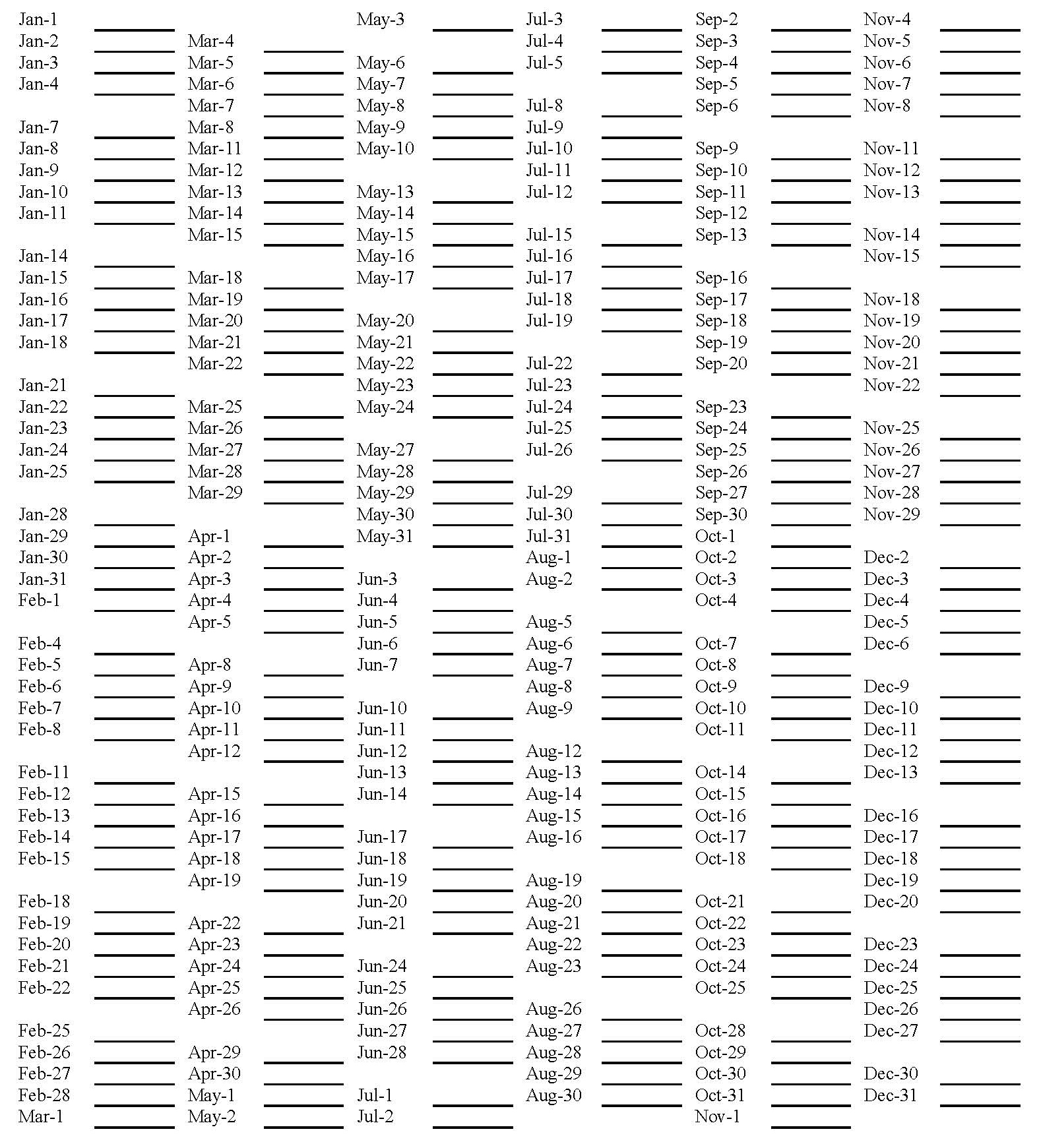
HOW EVERYONE PLAYS A ROLE IN MAKING THE SCHEDULE WORK:

|  |
| --- |
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#### SCHEDULE FORECASTER FOR 2019

The purpose of forecasting the schedule is to create smooth flowing days. Light days and heavy days create stress in the office. It also creates front to back tension. It is important to put a structure in place to prevent this from occurring. On the next page there is a schedule forecaster for the year. Use this format to create your own in years to come. The instructions for using this are as follows:

1. Mark off all weeks and days the office will be closed for seeing patients.
2. Record the number of patients seen on the patient days on the line next to the date.
3. Post this by the scheduling computers.
4. Project where patients will be scheduled at your morning huddle.
5. Look at how being out one-week effects the schedule six weeks out.
6. This enables you to plan how the patients will be scheduled. Being proactive verses reactive reduces stress.



EMERGENCY TRACKING FORM

Sample

**Patient’s Name: Date:**

**Bands/Bonds Off**

Band(s) off tooth: # # # # # #

Bond(s) off tooth: # # # # # #

Product on tooth or appliance?

Which assistant prepped the tooth?

Patient’s comments:

**Poking Wire**

Wire type?

Who inserted the wire?

**Other Emergency**

# NEW PATIENT INFORMATION SLIP

## *PATIENT’S NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Thank you for choosing our office. I need to gather some information that will take about five (5) minutes. Is this a good time for you?

How did you hear about our office?

Do you have any friends or family members that are patients?  No  Yes,

Have you (*or the child’s name*) seen another orthodontist?  No  Yes

Who is your (*or the child’s name*) general dentist?

We will be happy to contact Dr. ‘s office (*the dentist*) and let them know you have made an appointment and how much we appreciate their referral. We will also check to see the date of your (*or the child’s name*) last cleaning and x-rays.

**\*\* If Adult Appointment – Ask \*\***

What particular concerns do you have about your teeth that encouraged you to phone our office?

**\*\* If Child Appointment – Ask These Questions \*\***

How does \_\_\_\_\_\_\_\_\_\_ feel about getting braces?

Do you have any particular concerns?

Besides you, will anyone else be involved in the decision to begin \_\_\_\_\_\_\_ treatment?

No  Yes,

Dr. likes to make his/her patient’s feel welcome, he/she would like to know what \_\_\_\_\_\_\_\_\_\_\_\_\_\_’s interests are.

**\*\* Go to Computer Screen \*\***

Please excuse me for just a moment while I put some information into the computer so I can make your appointment. *Enter basic name, address and phone number into the computer.*

**\*\* Pull Up Next Available NP Appointment \*\***

Do you have a particular day of the week that works best for you? Then offer two options.

My first available appointment is \_\_\_\_\_\_\_\_\_\_\_\_\_\_. (*move on once appointment is established*)

If Dr. says that \_\_\_\_\_­­­\_\_\_\_\_\_\_ is ready to start treatment, the next step is to take diagnostic records, scan, photos, & x-rays. We can save you a trip by taking those during this visit. We will need to allow an additional half-hour for this. Would this be of interest for you?  No  Yes

If you have insurance coverage, please bring in your card and we will be happy to verify your benefits, or I’d be happy to take it now if that works for you.

Please plan on being here for approximately one hour, Dr. will tell you if treatment is needed, approximately how long the treatment time would be and our treatment coordinator will discuss fees and payment options with you.

Please visit our website for directions to our office.

Is there anything else I can provide for you?

Thank you for calling our office. I am sure you will enjoy your visit here. Dr. is a very nice person and a great orthodontist. We will see you on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Have a great day!!!!

**CROSSTRAINING CHECKLIST**

Cross-trained staff members are a valuable asset to the team. Give each team member a copy of this checklist to complete. Make it fun. See how many people can help out in how many different areas of the practice. (staff member) is trained to perform the following duties:

**BUSINESS OFFICE:**

1. Greet patients in the reception room
2. Order business supplies
3. Run monthly reports (production, collections, etc.)
4. Keep front office tidy
5. Sort mail each day
6. Follow-up on broken appointments
7. Keep on top of recalls
8. Collect payments
9. Confirm insurance
10. Send monthly statements
11. Assist in patient flow
12. Answer financial questions
13. Process auto payment
14. Turn on computers
15. Open up the office
16. Change messages
17. Schedule appointments
18. Set-up the schedule
19. Post payments
20. Run day sheets
21. Make deposits
22. Submit insurance claims
23. Close the office
24. Conduct new patient process
25. Conduct a deband conference
26. Process letters

**CLINIC:**

1. Keep track of inventory and stock each item
2. Clean and stock units
3. Set-up brackets for bondings each day
4. Instrument and handpiece maintenance
5. Take impressions
6. Fit bands
7. 5-minute scan
8. Perform deband procedures
9. Take an emergency call
10. Keep on top of treatment overruns
11. Assist doctor in progress updates
12. Keep patient flow running smoothly
13. Seat bonded retainers
14. Take X-rays and photos
15. Change arch wires
16. Patient education at bonding
17. Assist doctor with clear aligner patients

**LAB:**

1. Trim models
2. Make Essex retainer
3. Print 3D models
4. Make Hawley retainer
5. Set-up indirect bonds
6. Assist in taking records
7. Know how to take care of a simple emergency

**EVALUATING YOUR CURRENT COLLECTION SITUATION**

Number of Contracts Number of Contracts Past Due

Number of Open Accounts Number of Accounts Past Due

Run a report of your:

Total

a. Delinquent over 30 only accounts

b. Delinquent over 60 only accounts

c. Delinquent over 90 only accounts

##### (The total of a, b, & c divided by your total number of contracts equals your percentage of past due contracts.)

***Sample Chart of Past Due Contracts***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # of Contracts | 5% | 10% | 15% | 20% | 25% |
| 300 | 15 | 30 | 45 | 60 | 75 |
| 400 | 20 | 40 | 60 | 80 | 100 |
| 500 | 25 | 50 | 75 | 100 | 125 |
| 600 | 30 | 60 | 90 | 120 | 150 |
| 700 | 35 | 70 | 105 | 140 | 175 |

***Excellent------------------------------------------------------------------→Needs Improvement***

**Other Areas to Evaluate:**

1. What was your amount written off for bad debts last year? Ideally, 2% or less of gross collections? (i.e. $800,000 collections /$16,000 or less written off)
2. Do you have old past due accounts that need to be written off?
3. How many patients in retainers have accounts that are past due?
4. How many contracts are paid out and the patients are still in braces over their target date?
5. Are your insurance accounts current?

# MARKETING CALENDAR

I recommend setting up a Marketing Calendar each year. The following is a sample design. Establish a target date for implementation of each idea.

**MARKETING CALENDAR FOR**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **KIDS** | **PARENTS** | **STAFF** | **COMMUNITY** | | | | **REFERRING**  **OFFICES** | | |
| **JAN** | Appt. Card Contest |  |  |  | | | | Visit 5 Offices | | |
| **FEB** | Valentine’s Day  Contest | Order Hand Mirrors  (Gift for Parents) |  | Dental Health Mth.  Display Booth (mall) | | | | Invite Staff in 5  Offices | | |
| **MAR** | Decorate for St.  Patrick’s Day |  | Pot Luck Dinner |  | | | | Invite Staff in 5  Offices | | |
| **APR** | Easter Contest | Contest for Parents | No Patient Day-  Springs Clean &  Eat Pizza |  | | | | Invite Staff in 5  Offices | | |
| **MAY** | Vacation Postcard  Contest |  |  | Speaking  Engagement for  Women’s Legion | | | | Office Open House | | |
| **JUN** | Swimming Party | Swimming Party for  the Family | Progressive  Concepts Course,  Myrtle Beach, SC | Sponsor Softball  Team | | | | Sponsor Continuing Ed.  Course | | |
| **JUL** | Decorate for 4th |  | Wear Red, White  and Blue |  | | | | Visit 5 Offices | | |
| **AUG** | Staff Baby Picture  Contest |  | Office Swimming  Party | Sponsor Community  Blood Drive | | | | Invite Staff in 5  Offices | | |
| **SEP** | Back to School  Pencils/Book Covers |  | SURPRISE! Slow 1st week of school -  Day Off with pay! |  | | | | Invite Staff in 5  Offices | | |
| **OCT** | Halloween Contest |  |  |  | | | | Invite Staff in 5  Offices | | |
| **NOV** | Skating Party | Skating Party | Decorate for  Thanksgiving |  | | | | Invite Staff in 5  Offices | | |
| **DEC** |  |  | CHRISTMAS PARTY - Decorate  Office for Kids | Sponsor a Needy  Family for the  Holidays | | | | Deliver Holiday  Goodies to Offices | | |
| **GENERAL IDEAS:**   1. **Office T-shirts** 2. **No-No Bag at Deband** 3. **Thank You Notes for Referrals** 4. **Banding Calls** 5. **Social Media in the Dental Office $9.95 ADA Catalog** | | | | |  |  |  | |  |  |

**PRACTICE SYSTEMS ANALYSIS QUIZ**

*Answer the Following Questions True (T) Or False (F)*

## SCHEDULING

1. We rarely get a complaint from patients regarding waiting to be seen.
2. We have an organized scheduling template.
3. We focus on reducing repairs.
4. We can get key production appointments scheduled in ten days.
5. We have appointment book guidelines that we follow.

Total number rated True \_\_\_\_\_ Total number rated False \_\_\_\_\_\_\_

## CLINICAL

1. We have our band and bond failures under control at 5% or less.
2. We have a good system to direct the doctor patient to patient.
3. Our efficiency and harmony is not disrupted by front to back conflict.
4. Our assistants share equally in the patient load.
5. We do an excellent job of informing our patients and parents throughout treatment.

Total number rated True \_\_\_\_\_ Total number rated False \_\_\_\_\_\_\_

## NEW PATIENT PROCESS

1. We are quite pleased with our case acceptance.
2. We know we project an excellent image.
3. Our new patients are not kept waiting longer than 5 minutes for the doctor or coordinator.
4. We offer same day starts.
5. Our payment plans and fees are affordable to the majority of our patient base.

Total number rated True \_\_\_\_\_ Total number rated False \_\_\_\_\_\_\_

## MARKETING

1. We have a written annual marketing plan.
2. We have an annual marketing budget.
3. Our staff has allocated time to market.
4. We are pleased with our new patient numbers.
5. Both our office image and quality of results are excellent.

Total number rated True \_\_\_\_\_ Total number rated False \_\_\_\_\_\_\_

**COLLECTIONS**

1. We promote auto payment.
2. We are insurance friendly.
3. We have less than 5% of our accounts past due.
4. We fully inform the responsible party up front regarding finances and collections.

Total number rated True \_\_\_\_\_ Total number rated False \_\_\_\_\_\_\_

Grand total rated True \_\_\_\_\_\_\_ Grand total rated False \_\_\_\_\_\_\_\_

***Rating Scale:***

25-22 true answers is excellent

21-18 true answers is good

17 or less true answers, indicates you need to get to work immediately on the key systems in your office to enhance the atmosphere and production for everyone involved.

Review your answers and set target dates for implementation.

**WHAT ARE YOU WILLING TO DO?**

WHAT AREAS IN YOUR PRACTICE COULD BENEFIT FROM CLEARER STANDARDS?

1.

2.

3.

WHAT AREAS IN YOUR PRACTICE COULD BENEFIT FROM CLEARER ACCOUNTABILITY?

1.

2.

3.

LIST THE SPECIFIC AREAS THAT ARE A SOURCE OF FRUSTRATION AND STRESS FOR YOU?

1.

2.

3.

WHAT SYSTEM COULD YOU PUT INTO PLACE TO ELIMINATE THE STRESS AND FRUSTRATION?

1.

2.

3.

WHAT ARE YOU WILLING TO DO?

BY WHAT DATE?

**POP QUIZ**

Circle the point value that accurately applies to each question concerning your office.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | Point Values | | |
|  |  | Yes | Sometimes | No |
| Do you hear a lot of laughter in your office? | | 3 | 2 | 1 |
| Does the staff smile a lot? | | 3 | 2 | 1 |
| Do you look forward to doing fun things together | | 3 | 2 | 1 |
| Are birthdays celebrated in your office? | | 3 | 2 | 1 |
| Is there a lot of communication at your staff meetings? | | 3 | 2 | 1 |
| Does the staff look forward to staff meetings? | | 3 | 2 | 1 |
| Are you continuously learning together as a team? | | 3 | 2 | 1 |
| How do people react when a mistake is made? (supportive = yes, apathetic = sometimes, fearful = no) | | 3 | 2 | 1 |
| Does the staff come forth with lots of ideas? | | 3 | 2 | 1 |
| Do you have lunch together often? | | 3 | 2 | 1 |
| TOTALS (add your circled answers to get column totals) | |  |  |  |

Scoring: 24 or more in the “Yes” column is EXCELLENT.

21-23 in the “Yes” column is GOOD.

18-20 in the “Yes” column is AVERAGE (never strive to be average).

Less than 18 in the “Yes” column means your team NEEDS FOCUS on team spirit.

**TEAR THE PAGE**