



LCP Dental Team Coaching (the new name for Julie Weir & Associates) is recognized as the premier consulting firm specializing in pediatric dentistry since 1996.

## CASE STUDY #10: What Experience Do You and Your Team Members Provide?

### PRACTICE PROFILE

- A two-doctor pediatric dental practice. New owner doctor was previously the associate dentist. She acquired an existing seven year-old practice. The previous owner remained on as a part-time associate doctor less than 12 hours/week
- Two locations
- Owner doctor works four patient days per week and four to five in-office IV sedation days per year. Associate doctor works two to three half patient days per week and one in-office IV sedation day per month
- Six chairs: two restorative, four recare
- Team: two doctors (one owner doctor and one associate doctor), zero hygienists, six assistants, two front office
- Seventy percent of patients have PPO Insurances and 10 percent Medicaid
- Average monthly production as of 2017: \$118,631 combined for both offices
- Average monthly collections as of 2017: \$103,595 combined for both offices
- Collection ratio as of 2017: 87 percent
- Average monthly new patients: 67 new patients combined for both offices

### DOCTOR CONCERNS

- Lack of organized systems at the front desk; lacking cohesiveness and teamwork
- Division of labor
- Follow-up on tasks delegated
- Lack of chair space
- Inefficient patient flow

- Inexperienced at holding team members accountable
- Difficulty in managing the team, the practice's growth and still do the dentistry
- Practice has plateaued
- Scheduling template needed in the dental practice management software

### DOCTOR GOALS

- Create an efficient schedule
- Increase productivity for the doctor(s) and team
- Increase collections
- Create standard operating procedures for the front office team to maximize efficiency
- Work on team communication
- Focus on customer service and patient experience
- Market satellite practice for growth
- Add another associate in one year
- Understand how to market properly

### FINDINGS

#### Leadership

- Doctor had natural leadership skills that required fine-tuning
- There was no true practice coordinator, resulting in no accountability from the team.
- Front office leader struggled with holding front office team accountable, causing lack of communication and consistency.
- Job descriptions unclear about expectations
- Did not share practice production or collection goals with the team

- Team did not have consistent scheduled monthly meetings
- Goals and vision for the practice were not clearly conveyed to the team, causing unclear expectations

#### Team Dynamics

- Low team morale because there was no true team leader to implement and follow through with strong systems and team building activities
- Lack of teamwork and unity due to the team being unaware of a common goal to work towards
- Lack of follow through due to unclear expectations

#### Facility/Presentation

- One office was in a brand new space/location. The other office was a satellite office
- Open windows and beautiful parent & kid-friendly décor
- Very clean and organized
- Nice reception area for parents and play area for kids

#### Front Desk Efficiency

- Separate Check-in and Check-out areas
- Inefficient insurance verification system
- Insurance coverage tables not updated resulting in incorrect treatment plans
- Poor efficiency due to lack of standard operating procedures manual.
- Needed proper verbiage for cancellations, no shows or last-minute changes in the schedule

- No use of route slips/daily huddle sheets
- Appointment policy documents outdated and missing important information
- Ineffective communication among team members regarding patient and appointment notes
- Statements not being sent consistently
- Collections process nonexistent

### **Scheduling/Production**

- Unproductive Morning Meetings due to a lack of someone to lead these meetings
- Block Scheduling Template needed for efficient scheduling
- New patient appointments not scheduled correctly and often ran behind, causing new patients to wait
- Unscheduled treatment not followed up on
- Inefficient recare system

### **Marketing**

- New logo created and website updated
- No Marketing team established so owner doctor was doing most of the marketing
- Community involvement and some school presentations
- Social media not being posted to regularly
- Effective website and good search engine optimization
- Not consistent with tracking new patients and referral sources

## **RECOMMENDATIONS**

### **Leadership Recommendations**

- Doctor shared his vision for the practice with the team to create unified goals to work towards
- Created new practice and team mission statements. Posted them in the office where they could be seen
- Identified Clinical Coordinator and Front Office Leader- doctor spent time having leadership meetings and developing them
- Morning Huddles, monthly Team and Quarterly Department meetings happening consistently
- Practice Vital Signs and goals monitored to ensure that implemented systems are working

- Set individual performance goals for the year during scheduled performance reviews

### **Team Dynamics Recommendations**

- To increase team morale, team members and doctors express appreciation for each other daily
- Schedule quarterly “Team Building/Bonding” events
- Update job descriptions and review them periodically for updates
- Team members held accountable to accomplish their expectations

### **Front Desk Recommendations**

- Everyone taught proper verbal skills and techniques for converting shoppers
- Create Standard Operating Procedures Manual for the front office team to reference. Use this manual as a guide for training all new team members
- Properly trained to:
  - Maintain healthy accounts receivable
  - Verify and update insurance
  - Use Dentrix software optimally
  - Schedule appointments according to customized templates related to practice goals
- Trained on best verbiage to keep schedule filled during school hours how to minimize last minute cancellations and no-shows

### **Scheduling/Production Recommendations**

- By placing patients in the proper block on the schedule, the experience gets up-leveled for the patient/parent and those scheduled around them
- A block scheduling template created to meet producer goals will contribute to a smooth flow and decrease running late with appointments
- Make sure specific front office personnel are held accountable for keeping the recare and restorative schedules full
- Full treatment to be entered consistently and correctly by clinical team members prior to walking patient to check-out
- Schedule uninterrupted time for specific team members to work the past due recare and unfinished treatment plan reports

- Chart reviews are to be completed by the clinical team the day prior to check for medical alerts, radiograph needs, and unscheduled treatment

### **Marketing Recommendations**

- Theme days should be done once to four times monthly and posted to social media
- Create a plan to post consistently to social media
- Authentic videos, Boomerang videos and photos and videos using Snapchat get more responses and engagement than just pictures
- Many parents like posting about their children’s experiences. Always have a signed consent form and only use their first name in the posts. Encourage parents to tag your social media pages
- Patients love to be celebrated. Create multiple opportunities to celebrate your patients during their visit, such as a Smiles Club, birthday prizes or a fun photo booth
- Create a full team birthday video email to be sent through your Patient Communication Software to patients
- Compliments from parents are perfect opportunities to inform them that we are always accepting new patients
- Team should understand that they are all part of the Marketing team
- Track new patient referral sources and send hand-written thank you notes
- Increase efforts to connect with referring and non-referring local healthcare providers to increase referrals and word of mouth

## **POST COACHING RESULTS**

- Business Analysis Report & Recommendations report created and followed
- Two Front Office Leaders needed to assist in the growth of each practice
- Hiring a full-time associate to have three doctors between the two offices
- New leaders and doctor began holding team members accountable in a respectful and timely manner
- Team united and worked together toward a common goal
- Substantial decrease in no-shows and can-

cellations

- Noticeable increase in production and collections due to new systems and increased understanding of software utilization
- Reviewing practice goal numbers and team became motivated seeing they could hit and surpass their goals
- Production increased 10 percent by an additional \$12,000/month to \$130,562/month by 2018
- Collections increased 18 percent by an additional \$19,000/month to \$122,685/month by 2018
- Collection ratio increased by six percent to 93 percent as of 2018
- New patients increased 34 percent from 67/month to a total of 90 new patients per month

#### WHAT YOU SHOULD LEARN FROM THIS

- The experience you provide is as important to your patients/parents as well as your team members
- Office culture is more important than the doctor's vision. If you have ever felt like you don't want to go into your office, chances are you are not the only one
- Morale and operational issues do not fix themselves; they perpetuate and blow up at the most inopportune times
- Leading team members is more effective than managing people. Business and leadership skills are needed now more than ever
- Make sure you are running your office and it is not running you
- Team members want to know goals and it helps them be more productive
- Properly training your team members is a wise investment. They impact your business more than you realize
- Reviews and word of mouth referrals will increase – What are parents saying and writing about the experience you and your team deliver?

**“If you build a great experience, customers tell each other about that. Word of mouth is very powerful.”**

**Jeff Bezos, founder of Amazon**

*Published four times a year, Practice Management and Marketing News is a featured column in Pediatric Dentistry Today.*

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