



## CASE STUDY #11: Profitable Practice Protocols

Below is a case where a great dentist who had been a resident for many years, lacked the skills to operate her practice and profitability was bleak, almost three years into practice ownership. Here is how she quickly turned that all around!

### PRACTICE PROFILE

- A single doctor pediatric dental practice. The owner doctor was previously an associate dentist at another practice for 4.5 years. She started a new dental practice 2.5 years ago.
- 1 location
- Owner doctor works 3-3.5 patient days per week, 1 hospital day per month, and 1 in-office GA day per month.
- 4 Chairs: 2 restorative, 2 hygiene
- Team: 1 doctor, 0 hygienists, 4 assistants, 3.5 front office
- Average monthly production as of December 2020: \$52,546
- Average monthly collections as of December 2020: \$52,717
- Collection ratio as of 2022: 100%
- Average monthly new patients: 53

### DOCTOR CONCERNS

- Lack of personal organization
- Managing expectations with the team
- Ineffective accounts receivable system
- Lack of understanding of the practice numbers and benchmarks
- Inexperienced at holding team members accountable
- Communication skills
- Professionalism of the team
- Customer service
- Inconsistent patient schedule
- Training and efficiency of the clinical team
- Increase new patients and retention of current patients
- Follow-up on completion of tasks
- Overwhelmed with the management of the office, the team, and performing dentistry
- Hiring the right people for the practice

### DOCTOR GOALS

- Grow practice through effective marketing and reviews
- Hire a leader for the practice to assist with employee accountability and administrative tasks
- Create standard operating procedures for the team to maximize efficiency
- Work on team communication and expressing appreciation
- Effectively train clinical team members to be efficient and stay on track with the schedule
- Focus on customer service and patient experience
- Lead with confidence
- Increase scheduling effectiveness
- Set new growth goals with team members
- Organize personal space for optimal productivity and focus

## FINDINGS

### LEADERSHIP

- Doctor working on gaining confidence in managing expectations, holding team members accountable, and requesting performance changes.
- The doctor was the only leader in the practice resulting in her having to hold the team accountable, manage administrative tasks, and oversee employee performance resulting in the doctor being overstretched.
- The doctor did not share practice production or collection goals with the team.
- Doctor's Vision and Mission were not clear to the team, causing unclear expectations.
- Team did not have consistent scheduled monthly meetings.
- Team members did not have written up-to-date job descriptions.
- Inefficient communication due to inconsistent team and department meetings.
- Lack of trust in team members to perform their duties.

### TEAM DYNAMICS

- Low team morale because there was no true team leader to implement and follow through with strong systems
- 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
- Lack of preparedness for the day due to no morning huddle
- No clear delineation of duties resulting in tasks and responsibilities not getting accomplished
- Inappropriate amount of team members due to turnover
- Lack of structure

### FACILITY/PRESENTATION

- Office in a nice location/newer building
- Child-friendly décor
- Clean and organized in common areas
- Nice reception area for parents with a large television playing kid-friendly movies, interactive play stations throughout the office, and a designated play area for kids

### FRONT DESK EFFICIENCY

- Welcoming check-in area with beautiful practice logo displayed prominently
- No private area to present treatment plans and discuss financial responsibility
- Insurance payments only being posted one time per week
- Insurance coverage tables and fee schedules not updated in software
- No clear delegation of duties for accountability
- Poor efficiency due to lack of standard operating procedures manual
- Needed proper verbal skills for scheduling appointments, handling cancellations, no-shows, and last-minute changes in the schedule
- Ineffective communication among team members regarding patient information and appointment notes

### SCHEDULING/PRODUCTION

- Morning meetings not being held
- No scheduling template being utilized for efficient and productive scheduling
- Clinical team not staying on schedule with patients
- Late patients being accommodated causing on-time patients to wait
- Unscheduled treatment not followed up on
- No preventive care system being utilized
- No knowledge of daily provider goals

## MARKETING

- No marketing team established leaving one person marketing remotely
- Community involvement and school presentations
- Doctor or team member was visiting referring offices on occasion
- Social media posts not engaging or consistent
- Effective website and good search engine optimization

## RECOMMENDATIONS

### Leadership Recommendations

- Doctor shared her vision for the practice with the team to create unified goals to work towards
- Created practice and team mission statements. Posted them in the office where they could be seen
- Hired office leader-doctor spent time having leadership meetings and developing him
- Morning huddles, monthly team, and quarterly department meetings happening consistently
- Practice vital signs and goals monitored to ensure that implemented systems are working
- Hire a clinical leader to help develop the clinical team to be more efficient
- Scheduled consistent performance reviews to discuss accomplishments and goals for the future

### Team Dynamics Recommendations

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

### Front Desk Recommendations

- Everyone taught proper verbal skills and techniques for converting shoppers
- Present treatment plans and financial responsibility in a private area
- Create Standard Operating Procedures Manual for the front office team to reference. Use this Manual as a guide for training all new team members
- Establish specific roles and duties for team members such as check-in, check-out, and treatment coordinator
- Trained to properly verify insurance benefits and eligibility, enter coverage tables and fee schedules into software
- Coached on verbal skills to maintain a full and productive schedule during school hours and how to minimize last-minute cancellations and no-shows

### Scheduling/Production Recommendations

- A customized block schedule was created to meet provider goals and help establish a smooth flow and stay on time with appointments
- By placing patients in the proper block in the customized block schedule, the patient experience was up-leveled for all patients and parents throughout the day
- Make sure designated front office team members are held accountable for keeping the hygiene and restorative schedules full
- Schedule uninterrupted time for designated members to work the past due continuing care and unscheduled treatment reports
- Chart reviews are to be completed by the clinical team at least one day before to check for medical alerts, radiograph needs, and unscheduled treatment

### Marketing Recommendations

- Theme days should be implemented and posted to social media
- Establish a marketing team with team members who are interested and excited to create and post to social media consistently, sign up for and help with community and school events
- Post photos and videos of patients enjoying their visit. Be sure to obtain a signed consent form and only use the patient’s first name in posts. Encourage parents to tag your social media pages
- Create a full team birthday video to be sent through your patient communication software to patients

- Ask for referrals and reviews from parents during their child's visit
- Increase efforts to connect with referring and non-referring local healthcare providers to increase referrals and word of mouth

### Post Coaching Results

- Practice Business Analysis & Recommendations Report created and followed
- New leader and doctor began holding team members accountable in a respectful and timely manner
- Substantial decrease in no-shows and cancellations

- Morning meetings were implemented to better communicate and plan for the day and goals were discussed leading to an increase in production
- Designated roles and responsibilities were given to front desk team members resulting in full schedules, increased production, and collections with new systems
- Production increased 63 percent by an additional \$49,000/month to \$101,751/month by January 2022
- Collections increased 60 percent by an additional \$45,000/month to \$98,440/month by January 2022
- Collection ratio increased two percent at 102 percent in 2022
- New patients increased 32 percent to 73 per month in 2022

### Takeaways to Increase Profitability

- The exceptional experience you provide to your patients/parents is what keeps them coming back and referring others to your office
- Office culture and communication are vital to creating a high-functioning team where everyone enjoys their job and their coworkers. Parents and patients can see and feel when a team enjoys what they do and each other
- Leadership is about influence. Learn to motivate and inspire your team and they will take your practice to the next level
- Make sure you are running your office and it is not running you
- Having systems in place increases efficiency and consistency

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

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| <p><b>TOP 10 FRONT DESK VERBAL SKILLS REFERENCE</b> <del>\$68</del></p> <ul style="list-style-type: none"> <li>• Answering the Telephone</li> <li>• New Patient Phone Call</li> <li>• New Patient Arrival Greeting</li> <li>• Patient Check Out</li> <li>• Courtesy Call</li> <li>• and MORE!</li> </ul>  | <p><b>NEXT LEVEL MEETINGS</b> <del>\$116</del></p> <ul style="list-style-type: none"> <li>• Action Plan</li> <li>• Practice Systems Reporting</li> <li>• Morning, Team, Leadership &amp; Marketing Meeting Agendas</li> </ul>         | <p><b>PERFORMANCE REVIEW &amp; JOB DESCRIPTIONS</b> <del>\$156</del></p> <ul style="list-style-type: none"> <li>• Effectively provide feedback and coaching on an employee's performance.</li> <li>• Pairs well with the Employee Total Compensation Calculator.</li> </ul> | <p><b>HIRING THE IDEAL TEAM MEMBER</b> <del>\$156</del></p> <ul style="list-style-type: none"> <li>• Includes step-by-step checklist for hiring the right person.</li> <li>• Pairs well with the Employee Total Compensation Calculator.</li> </ul> |
| <p><b>FINANCIAL FORMS PACKET</b> <del>\$92</del></p> <ul style="list-style-type: none"> <li>• Financial policies, forms and letters that you can further customize to meet the needs of your practice.</li> </ul>   | <p><b>EMPLOYEE COMPENSATION CALCULATOR</b> <del>\$68</del></p> <ul style="list-style-type: none"> <li>• Calculate wages, bonus, holiday, vacation, sick leave, retirement, fringe benefits, continuing education and more!</li> </ul> | <p><b>OVERHEAD BUDGET MONITORING</b> <del>\$92</del></p> <ul style="list-style-type: none"> <li>• Keep track of the total costs you spend on supplies each month.</li> </ul>  | <p><b>DOCTOR VISION &amp; MISSION EXERCISE</b> <del>\$92</del></p> <ul style="list-style-type: none"> <li>• This step by step exercise will greatly increase the probability of success.</li> </ul>   |
| <p><b>COMPREHENSIVE TRAINING RESOURCES SOP'S &amp; VERBAL SKILLS FOR THE PEDIATRIC DENTAL PRACTICE</b> <del>\$995</del></p> <ul style="list-style-type: none"> <li>• Over 60 pages of essential resources to improve practice systems               <ul style="list-style-type: none"> <li>• 21 Verbal Skills</li> <li>• 6 Standard Operating Procedures</li> </ul> </li> </ul> |   |   |   |

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