Abstract
It's been said that it takes a village to raise a child. In the case of dental practice management, it takes a total team to run a practice. There is a domino effect that takes place in running a practice. Key systems that lead to excellent communication need to be in place, which leads to knock-your-socks-off customer service and positive attitudes. This article discusses the 10 key management tools for running a successful dental practice.

Educational Objectives
Upon completion of this course, participants will:
1. Learn key communication skills for excellent customer service.
2. Learn how to design systems and protocols for production and collections.
3. Learn how to check daily on the pulse of the practice.
4. Learn how to schedule for optimal practice productivity.

Author Profile
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10 Top Management Tools for a Successful Practice
A Peer-Reviewed Publication
Written by Lois Banta

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Abstract
It’s been said that it takes a village to raise a child. In the case of dental practice management, it takes a total team to run a practice. There is a domino effect that takes place in running a practice. Key systems that lead to excellent communication need to be in place, which leads to knock-your-socks-off customer service and positive attitudes. This article discusses the 10 key management tools for running a successful dental practice.

1. Design systems and protocols for a good foundation of production and collections
Strategically plan the success of the practice by designing effective systems for production (total office and individual providers), net collections (gross collections minus refunds), adjustments (excluding bad debt), accounts receivables ratio, open time, and treatment acceptance. Listed are recommended statistics to track monthly. This gives the dental practice an opportunity to easily identify trends, which is a statistic that goes in a specific direction three months in a row. One of the most important statistics to track is the accounts receivables ratio. A recommended ratio is less than 1.0. This means that the average one-month production does not exceed accounts receivables balance.

2. Hire and train for positive attitude, and acquire great teams with a dedication toward customer service and effective communication
If a practice wants team members with great attitudes, write an ad to attract people with the best attitudes. Then inspect what is expected of the team by checking in with them often. I call this PPI’s (Personal Performance Interviews). This is a sit-down conversation that won’t take more than five minutes. Typical questions are, “What can I do to help you be more effective?” “How are things going?” “What challenges and celebrations do you wish to share with me?” Also, positive reinforcement plays a key role in keeping the team motivated and feeling appreciated. A simple thank you for the hard work and positive recognition for a job well done go a long way in reducing turnover and add longevity in a team.

3. Hold a “morning huddle” every day to check in on the pulse of the practice, and address day-to-day concerns before they become major issues
Often the morning meeting becomes a chart review. It is important to address all areas of the practice to avoid unpleasant surprises during the day. A recommended agenda is shown here:

A.M. huddle
“It’s a team sport”
AGENDA

Each week, one team member facilitates the meeting all week. This is rotated from team member to team member each week.

Yesterday’s schedule — What went right, what were the challenges?
• Doctor/Assistants
• Hygienists
• Report on new patient exams, including hot buttons and personality styles
• Report on consults/Treatment plan discussions

Today’s schedule
Administrative
• Changes in schedule
• ID patient needs through pertinent personal information
• New patients, emergency patients — referral source, any hot buttons such as personality quirks
• Next available power production block

Doctor/Assistants
• Where do we want to see emergency patients today?
• Health concerns — ID BP readings needed, etc.
• Does treatment plan for appointment confirm with schedule?
• Are all lab cases in?
• Identify any problem patients or procedures (for example, fearful, hard-to-numb)
• Photos needed (before-and-after full-face photos, photos for pre and post-prep, etc.)
• Patients due or overdue for continuing care

Hygienists
• Review schedule
• Undone dentistry – need to schedule
• Other family members due

| Gross Production – Total Office | Gross Production – Doctor |
| Adjustments – Total Office | Number days available - Doctor |
| Number days - Total Office | Number available patient hours - Doctor |
| (On calendar-count number of working days practice is open) | Number open hours - Doctor |
| Gross Production – Hygiene 1 | Gross Production – Hygiene 2 |
| Number days available – Hygiene 1 | Number days available – Hygiene 2 |
| Number patient hours available – Hygiene 1 | Number patient hours available – Hygiene 2 |
| Number open hours – Hygiene 1 | Number open hours – Hygiene 2 |

Total Collections — TOTAL OFFICE

| Accounts Receivable Total Office | Total dollars outstanding insurance claims |
| Accounts Receivable | Total dollars outstanding insurance claims over 90 days |
| Accounts Receivable dollar amt 0-30 days | Accounts Rec dollar amt over 90 days-Total Office |

Total number new patients

| Number new patients | Dollars diagnosed – New Patients |
| Number new patient | Dollars accepted – New Patients |
| Emergency Only – D0140 | Case acceptance rate |
4. Strategize each week by holding team meetings
Set a theme for each week.

a. Week 1: Cross training — Set aside this team meeting to cross train departments. Some possible clinical cross training opportunities include heat sterilizing instruments, ordering clinical supplies, restocking operatory, prediscussion with patients, post-op instructions, and charting. Possible administrative cross training opportunities include scheduling an appointment, discussing financial arrangements, handling objections, confirming appointments, finalizing appointments, new patient phone calls, and estimating dental benefits.

b. Week 2: Analyzing monthly numbers — Each department takes a section of the monthly monitor and reveals the previous month’s statistics, percentage of goal, and trends identified. It’s also helpful to understand the overhead in the practice for optimal understanding of what it takes to run a successful practice.

c. Week 3: Continuing education — This team meeting addresses continuing education opportunities. You could review a recent conference attended, invite a specialist to the practice to review their specialty with the team, invite a product or services organization to review new and updated products and services, or in-office training on dental software.

d. Week 4: Role play/practice communication for patient questions — This is very helpful in improving communication in the practice with patients. It is also an opportunity to identify and problem-solve patient concerns and questions. List patient questions for an entire week, bring the questions to the team meeting, and discuss optimal responses to improve communication.

e. Week 5: Sometimes there is a fifth week in the month. During these weeks, hold an attitude adjustment lunch. The rule for this meeting is don’t talk work. This is an opportunity for practice members to bond and increase their effectiveness through fellowship.

Design these team meetings to be productive, not become complaint sessions. Hold the team meetings at a set time each week for 90 minutes. The first 30 minutes is for lunch, and the second 60 minutes is for the team meeting. Develop written action plans. Bring these to every team meeting. The action plan should have four columns:

- Column 1: Item to be addressed
- Column 2: Name of facilitator taking on the project — a project coordinator
- Column 3: Target completion date
- Column 4: Celebration/completion date

I recommend bringing in lunch and holding the meeting where there will be the least interruptions. As for the concern that the production could be less on these days, I recommend setting the production goals as if it were a full day, which means raising the hourly goal slightly to make up for the one hour decrease in seeing patients. This way the productivity is not reduced.

5. Choreograph the schedule for optimal productivity
There are many ways to achieve a productive schedule. It is just as stressful to produce high production days as it is to produce low production days. Arrange the schedule in blocks of time based on the preferences of the practice producers. Key communication skills are needed to achieve optimal success. This means not asking yes or no questions. Asking yes or no questions puts the practice at risk for patients not accepting optimal dentistry. In addition, always offer two options. Offering patients two options puts them in control. However, the practice is actually in control because they are offering two appointments that work best in their schedule. Another consideration is how appointments are scheduled and how many columns are being used. “X” scheduling is a method of compartmentalizing appointments into anesthetic/doctor/assistant time. Once it is determined for each procedure how many time units are needed for each section of the appointment, there will be predictable results. I’ve listed a sample schedule that demonstrates “X” ideal scheduling. It is important to create a master sheet of all appointments detailing how many time units are needed for each procedure for optimal nonverbal communication in the practice. Written protocols also need to be in place for confirming and handling short notice cancellations and failed appointments.

a. Do say: We’re calling to let you know you’re on our schedule. Don’t say: Remind or confirm.

b. If a patient needs to cancel, do not offer the person the very next appointment. Instead, schedule them in two to four weeks. Then offer to place them on the priority list if a change in schedule happens sooner. This retracts the patient and doesn’t give the person the idea that the practice is always available on short notice.

c. Have a two-to-three-strikes and you’re out failed appointment guideline. If a patient fails two or three appointments in a row, formally release the person from the practice. Send a letter by priority mail with a delivery confirmation releasing them from the practice. Failed appointments are one of the most costly things in a practice. If a hygiene appointment is worth $150 and there is one appointment per day unfilled because of a failed or canceled appointment, then over a course of 220 days in a practice year the loss would total $33,000, and that is for only one hygienist in the practice!
6. Get the money off the books and into the bank quickly

Collection strategies are a crucial element of a successful practice. Getting the money on the books is one thing, however, if the money isn’t collected, it can’t come off the books. Detailed strategies and systems must be in place.

a. When scheduling dentistry for patients, careful attention must be paid to financial arrangements. Be sure all financial arrangements are in place and patients fully understand their responsibility. Obtain signed treatment acceptance and financial agreements. Collecting the patient’s portion while scheduling an appointment ensures patient compliance, because paid for dentistry rarely fails.

b. Have a written protocol in place for following up on overdue accounts. Send statements in a timely manner. Call on all accounts. Send statements in a timely manner. Call on all accounts for balances over 30 days overdue.

c. Set aside private time to consistently follow up on accounts that haven’t paid or acknowledged an overdue balance in four statement cycles, the patient is probably not going to pay and collection action is recommended. Refer accounts for collection action is recommended. Refer accounts for collection after approval from the dentist. Once final collection action is taken and the account is referred for collection, write it off as uncollectable as a bad debt, inactivate the account, and release the patient formally from the practice.
7. Use excellent customer service. Patients’ impressions of you begin on the phone and when they enter your office.

Patients make decisions about the quality of care based on how they are treated on the phone and when they walk through your doors. Of all the top management tools in a practice, customer service is one of the most important. Excellent customer service can be revealed in many ways — how a patient is treated on the phone when they call the office, how a patient’s questions are answered, if they feel able to ask questions and make informed decisions, and if the practice includes the patient and his or her partner/spouse/family member in the decisions regarding their dentistry. Other examples are giving a patient a tour of the office, and not putting a patient in a position to have to repeat their story when handed off to another team member.

8. Sharpen your clinical and practice management skills often by attending and participating in continuing education

The practice that invests in learning together is a team that will grow in the right direction. Attending continuing education together reinforces consistency. The team that stops learning, stops growing. Continuing education doesn’t mean having to leave the practice to learn. There are many webinar, CD, and DVD learning opportunities that offer many pathways to grow a practice. Seek these opportunities, involve the team, and seize the moment.

9. Inspect what you expect

There are many ways to inspect what you expect in an office, and I’ve addressed them in this article. The most important thing is to lead by example and stay checked in to the practice. Create an infectious environment to keep learning and growing. Involving the team in this process creates a sense of ownership and offers a practice ultimate success. Leaders set examples and reinforce the result. This leads to positive results, better communication, and less stress. Identify trends and challenges early, then be sure to tweak the challenges, turn weaknesses into strengths, and celebrate the successes.

10. Have more professional fun and find your “internal giggle”

Remember to have good, professional fun in the practice. Patients quickly pick up on body language and what they see. Look for opportunities to make a positive impact in your practice by treating your patients and team with respect, care, and empathy. Find your internal giggle, and focus on positive results. Success is a choice. What you do with your choice is up to you.

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Questions

1. What statistics should be tracked monthly?
   a. Accounts receivable ratio
   b. Production and Net Collections
   c. Adjustments
   d. All of the above

2. How do you strategically plan for the success of the practice?
   a. Find a good location.
   b. Install an outside sign offering discounts.
   c. Offer discount dentistry
   d. All of the above.

3. The purpose of a “morning huddle” is to:
   a. Tell jokes
   b. Check the pulse of the practice
   c. Complain about patients who are coming in
   d. None of the above.

4. What is the purpose of Weekly Team Meetings?
   a. Hearing complaints.
   b. Attitude adjustment
   c. Analyzing monthly numbers
   d. All of the above

5. What is the purpose of an Action Plan?
   a. To address a complaint
   b. An action plan is a solution to a problem
   c. To plan for systems
   d. None of the above

6. How is productivity increased in a dental practice?
   a. Schedule in blocks of time
   b. Always offer two options in the treatment plan
   c. Have a 2-3 strikes and out “failed appointment guideline”.
   d. All of the above

7. When is a patient account deemed uncollectable?
   a. When the patient does not answer the phone any more
   b. No payment of overdue balance after four statement cycles
   c. When the patient does not come in for an appointment.
   d. When the patient moves to another city.

8. What is the best way to keep your patients coming back?
   a. Offer discount dentistry
   b. Taking your patients photo
   c. Offering Excellent Customer Service to all your patients
   d. None of the above

9. How does the dental team sharpen their skills?
   a. By constantly striving to improve
   b. By attending CE courses together
   c. By using Webinar, CD, DVD learning opportunities
   d. All of the above.

10. How do you strategically plan for the success of the practice?
    a. Find a good location.
    b. Install an outside sign offering discounts.
    c. Send out a direct mailing to potential patients.
    d. Design systems and protocols for a good foundation of production and collection.
Requirements for successful completion of the course and to obtain dental continuing education credits: 1) Read the entire course. 2) Complete all information above. 3) Complete answer sheets in either pen or pencil. 4) Mark only one answer for each question. 5) A score of 70% on this test will earn you 1 CE credit. 6) Complete the Course Evaluation below. 7) Make check payable to PennWell Corp. For Questions Call 216.398.7822

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1. Were the individual course objectives met?  Objective #1: Yes  No  Objective #3: Yes  No
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Please evaluate this course by responding to the following statements, using a scale of Excellent = 5 to Poor = 0.
2. To what extent were the course objectives accomplished overall?  S  4  3  2  1  0
3. Please rate your personal mastery of the course objectives.  S  4  3  2  1  0
4. How would you rate the objectives and educational methods?  S  4  3  2  1  0
5. How do you rate the author's grasp of the topic?  S  4  3  2  1  0
6. Please rate the instructor's effectiveness.  S  4  3  2  1  0
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9. Please rate the usefulness of the supplemental webliography.  S  4  3  2  1  0
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14. How long did it take you to complete this course?
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