Special office manager section

Over the past year, *Dental Economics* has given you articles for sharing with your office manager. This month, we continue the series with articles by Amy Morgan, Greg Prince, and Kirk Sweigard.

Previous features appeared in the March, June, and September issues. These may be found at dentaleconomics.com. Search: "office managers."

© Peshkova | Dreamstime.com

A simple 5-ingredient recipe for success in 2020

Amy Morgan

DECEMBER AND JANUARY CAN BE BUSY MONTHS for many dental teams, so squeezing in planning for next year can be challenging. But if you knew that taking just a few hours before you close the practice for the holidays to do just five things that would prepare you, your team, and your practice for sweet success in 2020, would you do it? Would you do it, especially if you knew it was a recipe to reduce stress, increase efficiency, and make it a better experience for your patients, your team, and you? Hopefully, your answer is a loud and enthusiastic "Yes!"

So, where to start? Right now, without hesitation, go set aside some uninterrupted time on the schedule where you can gather as a team to think about the future. Make sure you assign a facilitator to keep the brainstorming and action planning on track. Remember, a facilitator is not necessarily the doctor, office manager, or leader. The role of a facilitator is to make sure everyone contributes and desired actions are agreed upon and can be executed. A facilitator is someone who can manage time, distractions, and the focus of the discussion. And one last tip before we hop into our five ingredients: always implement the two-minute rule. If the problem is not the meeting's primary

focus and can't be solved in two minutes, it gets placed in the "parking lot" for future discussion.

This can be one session or multiple shorter sessions, depending on your schedule. Be sure to capture all the great thinking and ideas, and at the end, have a written plan that everyone has agreed on.

Are you ready for the five-step recipe to future success? Great! Let's get cooking!

NO. 1: IDENTIFY AND DOCUMENT WHAT YOU 'BAKED'

Always start with the positives: your systems' strengths. Teams seem to have an amazingly short-term memory when it comes to what went right, and they tend to focus and plan strategy based on the challenges they faced, not the successes they "baked." Yet, it's so very important to identify what worked, because what gets acknowledged gets repeated.

The end of the year is the perfect time to identify what you did right and capture that recipe for success. Look at any and all systems. Did you see a remarkable increase in patient referrals? Did the hygiene department enjoy a higher recall rate? Did marketing bring in more new patients than ever before, and were those patients a great fit for the practice?

As a team, identify what went right. Then, more importantly, determine why. There could be one big reason or many small reasons. List the reasons why that thing went right and build on them. In other words, what did you successfully bake and why?

NO. 2: HAVE A RECIPE

A recipe is merely a plan on how to cook a specific dish. And when it comes to practice success, you need a recipe. In fact, you need many recipes—one for every system in your practice! As I mentioned, you have to have a written plan that everyone agrees on. If you do brainstorming and generate great ideas, but have no plan to implement them, you've wasted time. If your team is given goals without a plan or any accountability, they may not be able to see the path and will become confused and cynical. This is not the way to get things done.

Don't be afraid of the plan. You can't kill a practice by one misstep in an overall strategic plan based on key performance indicator (KPI) statistics. Be sure not to develop analysis paralysis and be afraid to make a decision because it's not a sure thing. You delay the excellence you can achieve today by focusing on tomorrow's perfection.

A great plan has built-in flexibility, allowing you to shift as necessary. So, when you apply this to strategic planning, goal-setting, and plan implementation in the dental practice, you measure daily, and analyze and adjust your KPIs weekly, quarterly, and yearly. When you do, your systems will get better and so will each of the individuals on your team.

Congratulations! You have a pastry case filled with delicious options!

The end of the year is the perfect time to identify what you did right and **capture that recipe** for success.

NO. 3: LOOK AT WHAT GOT BURNED

Yesterday's challenges are merely tomorrow's opportunities. (Now that's a Hallmark card, if I do say so myself.) When analyzing the challenges/opportunities or the areas where you went up in flames, it's important that there is no blame, shame, or regret. It takes a team to succeed, which means when something falls short, everyone plays a role in it, too.

By listing and analyzing what went "less than right" (also known as, ahem, "wrong"), it will give you a pathway to what you need to do differently for better results. When you have the plan, you'll enjoy security, control, and predictable outcomes. By critically looking at success and failure, you will start the new year with best practices to protect you.

To summarize: If your system's cake fell flat, *change the recipe!*

NO. 4: MEASURING MATTERS

In this step, you identify the temperature for baking success and how to determine when your cake is done. Strategize first by statistics. Every system that impacts the success of the practice can be measured, usually in multiple ways.

For example, the following statistics are critical to determine if your practice website is working hard to attract, capture, and retain patients: click rate, bounce rate, the time visitors spend on each page, and the percent of new patient conversions.

Another system to examine statistically is treatment planning. Statistics include percent of patients who scheduled treatment, what treatment was scheduled (by treatment type, cost, and doctor), and what percent of recommended treatment was declined or delayed. Only then can you determine what's working (and why) and what's not working (and why).

Once statistics act as flags that point to successes and challenges in your systems, you can follow the path and create a strategy for improvement. For example, let's say your statistics show that successful treatment planning and case acceptance is strong when the cost of care is less than $100. But you see acceptance decrease as cost increases. You and your team can have a productive conversation on (1) when and how payment responsibilities and options have been presented to patients and (2) what guidelines/options the team can introduce differently in order to improve treatment value and commitment for more costly and complex care. Your practice KPIs would include scheduling, financial, treatment planning, recare, new-patient acquisition, marketing, online presence, retention, referrals, and more.

To bake your cake, know the measurements of the ingredients and the oven temperature first!

NO. 5: TRY NEW RECIPES FOR EVEN GREATER SUCCESS

When it comes to setting goals, be a possibility thinker, not a probability thinker. When you set goals, you can't plan on "doing the same thing" because nothing stays the same; it either gets better or worse. As the team leader, it's your job to compel your team forward by setting goals that are realistic, reasonable, and just a little bit out of reach. People like to strive for better. No one is, or at least they shouldn't be, enthusiastically committed to average. Many dentists are afraid to stretch goals because anything less is perceived as failure. The truth is if you don't go for the gold, then you may not get a silver or bronze.

Dreamers celebrate the small wins on the journey to the big win. So dare to dream a little. Your cake may not win the baking competition, but go for it anyway!

Finally, enjoy the holidays with family, friends, and of course great food. I hope that when the New Year arrives, you will be looking forward to implementing your recipe for practice success in 2020. **DE**

AMY MORGAN joined Spear Education in 2018 as vice president of consulting strategy. For more than 25 years as a consultant and trainer, and as former CEO of Pride Institute, she and her teams have revitalized thousands of dental practices using management systems proven to help dentists become more secure, efficient, and profitable.

By critically looking at success and failure, you will start the new year with **best practices** to protect you.

© Igor Mojzes | Dreamstime.com

Look for opportunity before you look at the numbers

Greg Prince

AS THE YEAR COMES TO A CLOSE and the doors open to a new one, many practice teams begin looking at possibilities, setting goals, identifying objectives, and committing to strategies. Having objectives is important because what gets measured often improves, and objectives help provide a purpose and pathway.

While January is typically the time when teams set objectives for the entire year, this can be overwhelming. Instead, it's something my team does continually throughout the year—and with great success.

FIND THE NUMBERS WITH OPPORTUNITY

Our team uses monthly, not annual, numbers to track the health of the practice. We focus on objectives and numbers that directly relate to patient care and impact financial health. By tracking and evaluating key numbers monthly, we can see trends easily and are able to take immediate corrective action when needed.

Although there are some key performance indicators (KPIs) that every practice should be monitoring, I believe success is created by finding the gaps in your business, tracking them consistently, and being willing to try something new to get better results.

FINDING THE GAPS

Let me give you an example. Our doctors and I examined the aspects of the practice that had the most opportunity for growth without adding to overhead (meaning no new equipment and no additional team members). Each morning, our schedule had us looking forward to a busy day, with all appointments confirmed and no holes in the schedule. At the end of the day, we would look back and see that on some days we ended up with almost 25% of our schedule empty due to cancellations and no shows. This was an issue because it meant our clinical team was nonproductive 25% of the day, and the front office had increased call volume to handle all of the rescheduling. We wondered how many more patients we could have cared for that day. More importantly, we considered how many patients were prevented from receiving treatment because the cancellations and no-shows took up appointment times. Ultimately, we had to look at how many more times we were going to allow some of our inconsistent patients to negatively affect our ability to provide care to others.

I believe success is created by finding the **gaps in your business**, tracking them consistently, and being willing to try something new to get better results.

FINDING THE SOLUTION

With the help of a consultant, we worked as a team to solve the problem through improving communication skills when patients set, confirm, call to cancel, or no-show appointments. It was sometimes as simple as changing our language: We no longer call to "confirm." The appointment was confirmed when the patient reserved time on the doctor's schedule.

We work hard to communicate the urgency of treatment and preventive appointments. We don't just immediately accept a patient's request to cancel. Instead, we seek to understand what is preventing the patient from coming in. We then try to provide solutions. Often it's just a matter of helping patients understand their priorities. After just three months, we started to see progress.

SET ACHIEVABLE GOALS

Another gap we found was within the financial system. When I first joined the team, we were sending out more than 750 statements a month. This was a real cost to the practice in terms of human resources. Our team's time was much better spent on patient care. There's also the reality that we are not a bank and should not have to pursue people to pay for dentistry that's already been delivered. So we tracked the number of statements we sent with the goal to reduce the amount to as close to zero as possible. In six months, that number decreased to less than 300. We continue to work hard to reach our ultimate goal by increasing our accuracy with estimates, improving our communication skills, and letting patients know early in the financial conversation that if they prefer to pay over time, we accept the CareCredit credit card instead of extending credit through the practice.

My best "best practice" is this: with everything you do, ensure all of the objectives you set and the numbers you track are focused on making a difference in the lives of your patients! DE

GREG PRINCE is a fellow of the American Association of Dental Office Management and AADOM's 2019 Practice Administrator of the Year. He has managed a pediatric dental practice in Nashville, Tennessee, for the last four years, and is president of the Nashville AADOM chapter.

Small changes can bring big benefits

Kirk Sweigard

EVERYBODY LOVES CHANGE, RIGHT? This is especially true when you already have your hands full delivering exceptional patient care at a busy dental practice. Many teams look at change as the enemy, a disruption to their day and a waste of time. But change is not the problem. It's how you approach change that can set up your team for success.

Consider what you experience in your daily life. When you look around, you see businesses of all types embracing and benefiting from technology. From QR codes to apps and software, we have seemingly unlimited potential to access information, save time, and be more efficient and effective—right at our fingertips.

Software today provides a wide range of capabilities, with updates and new apps available almost every minute of every day. This may make it seem complex and difficult to keep up with, learn, and implement. Maybe that's why many of us don't use all of the functionality available in our software. But as capabilities have increased, so has the intuitive ease-of-use functionality. Getting the maximum benefit from your practice management software takes a willingness to change, a desire to explore the possibilities, and dedicated time to seek out information and training.

FOCUS ON THE PATIENT FIRST

When we began working with leading dental practice management software platforms, our goal was to make it faster and easier for teams to use CareCredit. Why? Because we wanted to make it as easy as possible for teams to fully utilize the benefits of patient financing so more patients could get care. So, logically, it needed to be integrated into the software used to manage the practice—where dental teams "live." Making it easier for teams to use CareCredit also made it easier for patients to accept the dentistry they needed, because for many, having a convenient way to pay the gap between benefits and cost of care can make a tremendous difference. Much of the functionality of the CareCredit integration was at the request and input of dental teams across the country. For instance, having the application auto-populate from the patient screen and transactions write back to the ledger were two of the most popular requests that we were able to accommodate.

EXPLORE, DISCOVER, AND ASK

I remember when I got my new smartphone. I held in my hand something that could do so much. I wanted to know all of the cool things it was capable of. But when it comes to software, it's easy to become complacent and not upgrade or seek to discover functionality within your current version.

A great place to start is to fill in this blank: If only my software could ________. Chances are that functionality has been thought of and may be in your current version or next upgrade. If you haven't updated your software during the past two years, you may want to contact your software provider to request a demo of the most current functionality and to see if you're eligible to upgrade. If you are and the functionality can add value, then do it.

There are resources available online to help you optimize your current software version. A quick Google search of "how do I track my patient no-shows in (software name)" netted available training, cheat sheets, instructional videos, and more. Remember, a great resource for training and coaching may be the company providing the new technology, including user conferences where you can receive hands-on training.

KEY STRATEGIES FOR IMPLEMENTING CHANGE

When implementing something new in the practice—from software updates to new technology—it's important to have a plan and a champion. An ideal champion is one who has time to dedicate and focus on truly learning and understanding the new software, because that person will become the teacher/trainer for the team.

You may have heard of the term *kaizen*, which is often associated with managing change. Kaizen is a Japanese manufacturing term that refers to activities a company or team does to continuously improve functions, systems, and processes. One of the key aspects of kaizen is implementing change gradually. Today, people learn in "bite-sized" pieces, so often the best way to train or coach your team on a new technology or software is to develop an implementation schedule that organizes learning into small modules.

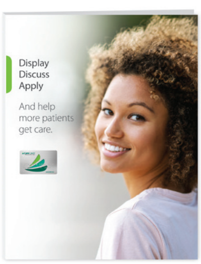
Embracing change, new ideas, and new ways of doing things help keep your practice innovative and fresh—for your team and patients. Of course, change just for change's sake is never good. New ideas are only good if they will enable the team to deliver an even better patient experience—because something that shouldn't change is focusing on helping patients walk out of the practice healthy and happy. DE

KIRK SWEIGARD is the strategic partners vice president of CareCredit. Collaborating with dental professionals, including consultants, associations, and suppliers, Sweigard provides the opportunity to develop and enhance relationships that support association members and dental practices.

Your team has a way to help more patients get care.

It's super **easy** and super **powerful**.

At work. At play. A lot goes into your day. Sometimes so much, it takes all your super strength. But remember, it's the simple things that make a big impact. Like teaching your kids the sky's the limit. Or, when patients have a patient portion, your team can save the day and fill the schedule by letting them know you have the CareCredit credit card as a financing option — before cost can become a barrier to care. It's a super easy and super powerful way to help more patients get care.



FREE Resource: Request your FREE **Display, Discuss, Apply** kit filled with easy ways to talk about CareCredit including practice displays, discussion guides and more.

Already accept CareCredit?
Call 800-859-9975, option 1, then 6.

Ready to add CareCredit?
Call 866-246-6401.

CareCredit®
Making care possible...today.

DE1219DA

#852-414-00