Leverage your Software to Achieve Results

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The purpose of the Dental Business Institute Program is to educate, train, and develop entrepreneurial dentists to successfully lead, manage, govern, and grow dental practices of any shape or size from solo practice, to managed group practice, to corporate models.

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Session One: What Can You Achieve with Dental Software? (It's Not Just Going Paperless)

In the past, dental software has been used as simply a scheduling and insurance processing tool or a replacement for paper charts. The future of dental software is to leverage the data for business decision-making and recognize the way your team uses the software drives continuous improvement for patient experience, financial results and even team satisfaction. In fact, as you're taking a variety of Dental Business Institute courses, you'll likely look to your dental software to implement all the great ideas you learn! Therefore, looking at the software you already have in your practice with a fresh perspective, gives you an opportunity to achieve your goals.

A Success Story

A 6 location group in PA decided to fine tune their existing operations using software. In 2 years they increased revenue by $1.3M without opening another office or hiring additional dentists. Projects implemented included:

• Incorporated production into an existing bonus plan and began weekly tracking

• Documented the process for treatment acceptance and began weekly tracking

• Updated the consult process for implants

• Documented phone call training and began weekly tracking

• Re-organized the refund process and tracking system

• Improved online ratings by establishing a requirement for gathering positive reviews

Throughout this course, we will review practical recommendations for how you can use your dental software to tackle projects just like this, and hopefully achieve similar success!

Foundations of Software Set Up

Your dental software touches every aspect of your practice and drives your numbers for production/ collection and patient volume/procedures, it's critical to make sure it's set up properly so that you understand how the data is gathered and calculated. A few basics to review:

- **Transaction locking:** Whether at end of month or a tighter timeframe, make sure that you are locking up past months so that data cannot be changed. This gives you confidence in your reports.

- **Adjustments:** Set each adjustment to impact production or collection so that you can change patient ledgers in the current period and maintain accurate reports. You must understand how each adjustment is set up in your system and then confirm that your team uses each one appropriately.

- **Reports:** Understand what reports are available in your software, find out which ones your team is using and confirm these are accurate. This includes any pre-built reports such as your deposit slip, day sheet, production/collection, new patients, etc. – and any custom reports you have created.

Next Steps

- Find out if you are using the most current version of your software – and if not, reach out to update. Be sure to confirm any specifications for hardware/networking and update these as needed.

- Review the most recent updates in your software

  - Review these with your team – are they aware? Are these being used in your practice now?

  - Find out when the next planned release is scheduled, make a note in your calendar to review these. Rinse and repeat.

- Set the expectation for your office manager/insurance manager and clinical lead – they are responsible for learning new features in the software, reviewing with you and then making a plan for training/implementation for the whole team.

- Set up a software trainer to work with your team at least twice a year to review the setup of your software (including transaction locking and adjustments), new features, top value features in the software overall, the workflows your team is following to look for faster/more efficient ways to work and reports to confirm your understanding.

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Session Two: Why Should You Care About Centralizing Your Data? (Even if You're a Solo Practice)

Centralized data allows for a solid infrastructure for your practice. It allows you to standardize, to create standard operating procedures (SOP's) and cross trained staff which drives consistent quality.

Software in a Dental Practice:

- Practice management software

- Accounting software

- Human Resources / Payroll software

- Marketing software for patient communication, reviews, campaigns

- Digital prescription software

Multi-Location Groups May Also Include:

- Phone system software

- Medical billing software

- Dental lab software

- Collections agency software

- Separate specialty software (often ortho)

- Digital Patient forms software

- Business Analytics software

"This is a lot of technology for a dental practice to manage. It's also a lot of opportunity for you to use the data you're gathering, not only to run your practice efficiently but to grow and scale."

To achieve results with your data, you will build the reports needed to understand your performance vs. benchmark, identify trends and then continuously improve your workflows to hit your goals.

A Word for Multi-location Groups

Often I see that when a third office is added to a group practice, that becomes the trigger to move to a single software for all locations because it's just too much variability in workflow, reporting and team skills. For multi-location groups with different dental software, consider a move to a single system that offers one patient record across all locations. This eliminates duplicated records when patients travel and wasted time emailing critical x-rays and notes between offices. For groups with specialists who travel between offices or who want to create a central business office it provides the data wherever needed and increases efficiency for your team.

Next Steps

- Make a list of all the different software packages you're using in your practice today – and note which ones you need to dig into to understand the set up and reporting

- Create a centralized data system – determine what data you will pull from each software and how you will format the layout

- Build basic reports – daily/weekly/monthly

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Session Three: How Do You Get Your Team on Board with Standard Operating Procedures?

First, what is the benefit to you as the dentist owner of investing the time to create SOP's? Let's acknowledge that most dental practices do not take the time to document a preferred workflow for critical tasks. Instead, they rely on team members to walk in the door, fully trained and trust verbal communication to ensure consistency. This often leads to blaming team members for poor performance, high turnover and frustration with results.

To create SOP's you may start by documenting:

- Patient workflow – From patient check in to walk out

- Office workflow – By role:

  - Admin team tasks such as confirmations, insurance eligibility, filling the schedule (recare, treatment), manage broken appointments, follow up on outstanding claims/collections and end of day metrics and daily deposit

  - Clinical team tasks such as review and clean up charts prior to patient visits, lab management, cleaning/sterilization, tray setups, inventory, clinical notes, maintenance

- Billing/Insurance workflow – insurance verification, attaching/sending claims, fixing rejections, follow up on outstanding claims, sending statements

To encourage your team to accomplish this project, you can use change management concepts to manage the communication and influence the outcome.

Change Management Steps: ADKAR

- Awareness: Talk with your team to explain why we are taking on this project and repeat this communication until each team member can explain it as well

- Desire: Acknowledge you cannot control this and in fact, expect passive refusal to do the work. Use 1:1 conversations to influence your team to participate.

- Knowledge: Train your team on exactly what you want created.

- Ability: The team starts and you will review the SOPs as they are finished. Establish a deadline for each one to be completed.

- Reinforcement: Expect struggles, continue 1:1 conversations to encourage your team. Celebrate when finished!

With documented SOPs, you can quickly train new hires and maintain a consistent quality patient experience. This also allows you to hire for attitude and enthusiasm and train the required skills. It also makes cross-training easier in cases when a team member is out of office for extended periods and finally, gives you the opportunity for continuous improvement as it's easier to tweak a documented system and measure the result.

Next steps

- Write down your "Why" – What is the benefit to you of documenting SOPs for your dental practice?

- Document your SOPs – including patient flow, office flow and billing/insurance flow

- Plan your team communication using ADKAR change management concepts

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Session Three: How Do You Get Your Team on Board with Standard Operating Procedures?

Increasing collections is often the first priority for an investment in technology for the dental groups I work with. As we have reviewed in our first three sessions, the big picture is on centralization and standardization, and this often translates into increasing collections from patients and insurance as the very first action steps.

Leverage your software with insurance

- Insurance eligibility – Use the automation in your software to save time

- Claims processing – Establish a quality control program to charge out accurately. Clarify the workflow for claims.

- Outstanding claims follow up – Determine workflow to handle rejections daily. Identify the aging report, document the SOP to resolve each claim and hold regular meetings to monitor this.

- Posting payments – Use the bulk insurance payment feature in your software. At least annually, work with a software trainer to review the latest features to post efficiently and accurately. Confirm the team's understanding of adjustments, unapplied credits and line item accounting.

- Plan for EOBs – Document the SOP for how you will save EOB's. If you have a workbook plan, confirm you are paid on the correct fee schedule.

Best practices for patient payments

- Send electronic statements – as final insurance payment is entered and in bulk monthly

- Set up online payment

- Run Aged Receivable report – just like the outstanding claims aging report, determine the workflow for contacting the patient and hold regular meetings to monitor.

Use your dental software to analyze your insurance carriers and make decisions about membership or fee negotiation. Find the best report in your software that shows you how many patients have each type of insurance and exactly how much you are writing off to belong to each carrier. Then you can reach out to carriers to negotiate fees, consider dropping your worst paying plans and truly understand the cost of insurance plan membership and how this drives collections.

Next Steps

- Confirm your team is using automated insurance eligibility and adding plan/patient notes in a standard template format.

- Clarify the process to make sure procedures are charged to patient ledgers accurately

- Review your outstanding claims aging report – What is your over 60 days percentage?

- Review your AR report – What is your over 90 days percentage?

- Review your insurance utilization report – Identify your top 5 carriers by patient volume and the associated write off

- Schedule a software trainer at least annually to review new features that will increase the efficiency of billing and insurance

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Session Five: 4 Tips to Make Better Business Decisions

Some dentist owners make financial decisions simply by looking at the cash in their checking account. You have dental software that will provide helpful data if you run the correct reports and then meet with advisors who can assist you in thinking through your business decisions.

Tip #1: Meet with your accountant to review reports together

Tip #2: Evaluate your profitability - use your reports to find opportunities to reduce expenses or increase revenue

Look to your dental software to increase revenue

- Increase your fees

- Negotiate with carriers to increase reimbursement

- Create a membership plan

- Fill your schedules – continuous improvement opportunity

- Improve case acceptance

- Offer patient financing

- Improve your collections

- Increase patient volume through marketing

- Many, many more ideas – just look through your software at each process and workflow to find opportunities to improve

Tip #3: Find/create the report to track performance for each area important to you

Tip #4: Meet with your consultant to understand reports together

Remember the success story from first session? You may recognize how this group used these ideas to select specific projects, establish tracking and document a workflow – and they achieved significant financial success. You can do the same thing!

Next Steps

- Set regular meetings with your accountant – review your software reports and your financial statements to discuss profitability, benchmarks and opportunities to improve

- Establish monthly performance tracking for the KPIs that matter to you

- Choose one KPI that you measure every month that you want to improve – create a project and use the ADKAR approach with your team

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Session Six: How to Get More Patients & Understand Marketing ROI

You can use dental software to understand your patient base and calculate the return on investment for your existing marketing activities. As our world rapidly moves to digital marketing, you can also make these trends work for you by using your technology to drive new patients.

Reports to run for marketing

- Active patient demographics – Look at age breakdown, zip codes, retention

- New patients

  - Look at each referral – add any missing

  - Confirm recare is scheduled (and attached in the appointment)

  - Update cell and email for future communication

- Referral Production – Review your referrals, Find any missing and update

  - Be thoughtful about the referral sources you set up

  - Use the production to compare against your expense to calculate ROI for each activity

- Active patients in recare – How successful are you at retaining patients and keeping them healthy?

- Procedure mix

- Year end benefits remaining patient list, other targeted lists

Maximize your dental software to drive new patients

To truly leverage your software to achieve results, you can customize and enable all the marketing features available. Most dentists turn on patient emails and texts for appointment and recare communications, and you can choose to take this a step further by customizing the messaging,

the frequency and the repetition rather than just leaving this at the default settings. Instead of just allowing your team to use 2 way text messaging to have regular conversations with patients, you can establish guides for content, timing and purpose to drive confirmations or positive reviews (be aware of text messaging laws).

Online booking for dental visits is in demand. Another success story to share: a multi-location group in WA state decided to enable online booking in their software. They promoted this through their website and social media accounts for new patients and they turned on the ability to book online through email/text reminders as well. In just 2 days, they had 18 patients book online.

Next Steps

- Use your practice management software to run the reports listed above

- Compare your marketing expense data to calculate your ROI

- Customize your patient communications – for appointments & recare

- Set up online booking

- Create a guide to use 2 way texting

- Plan email campaigns throughout the year

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Session Seven: Coaching Doctors/RDH to Maintain a Productive Schedule

Your schedule is key to your success, take full advantage of your dental software to make it productive, easy to understand for new hires and blocked for in-demand services. Use color wisely for visual communication, add notes for payment due and make sure the recare and treatment plans are attached so your patient communications are accurate. Create an SOP for handling broken appointments and highly desirable evening or weekend hours.

Reports to fill schedules

- Recare – look for unscheduled as well as patients who do not have a recare due date set in their record

- Unscheduled treatment

- Patients with a credit on their account

To save time following up with patients, focus on meeting the needs of the patients in your practice each day. Before each patient walks out the door, make sure to schedule their recare visit (and treatment if needed), enter their mobile number and email into the system and collect their copay. If you complete these tasks, you will not need to reach out to this patient to schedule and you will save yourself from sending a statement.

Next Steps

- Re-evaluate the set up of the schedule in your software – operatory naming convention, schedule blocking, new patients/emergency visits time reserved

- Create an SOP for broken appointments, as well as recare and unscheduled treatment follow up

- Set up your specialist's schedule

- Review doctors end of day net production and confirm accurate patient ledgers

- Set up a peer review program for continuous improvement among all doctors

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Session Eight: How to Provide a Quality Consistent Patient Experience and Team Workflow

"Use technology to drive the business processes to provide a consistent quality patient experience."

McDonalds and Starbucks are great examples of a consistent customer experience. You know what you will receive. Every time. You can achieve consistent quality in your dental practice by investing in the creation of SOPs and establishing a fully digital patient workflow. One of most critical pieces of the patient experience is billing. Starting with an accurate insurance estimate is critical for success – and the way you set up your software will drive this estimate and the confidence of your team to explain it to patients.

Building a smooth team workflow starts with identifying leaders and outlining their responsibilities and authority. As group practices grow, the leadership opportunities for team members expand – and are sorely needed to handle training, problem solving, staff schedules and communication. These leaders also play a role in learning new features in your software, making recommendations for workflow changes and then training/supporting the team.

Next Steps

• Create leadership positions in your practice – clinical lead and admin lead

• Implement a fully digital workflow – digital health history, digital treatment plan / consent forms, electronic statements

• Consider creating an insurance expert in your practice or group – and then re-evaluate the job description for the front desk team

• Invest in training for your team – practice management software, case acceptance, etc.

• Create teams and team leader positions to partner with the dentists and owner to accomplish measurable outcomes

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Session Nine: How Do You Scale Your Model? (Whether You Want to Remain at One Office or Expand to Multiple Locations)

Starting with your first office grow in phases and balance with capacity (both physical facility and support team/protocols). Focus on your vision, not just on getting bigger.

• Use your first office as your pilot to build solid SOPs, centralized data and a well-trained team

• Select solid foundational partners to establish your multi-location entity

• For multi-location groups:

• Target 4-6 locations for maximum profitability

• Begin by centralizing insurance/billing, and add support team functions including finance, marketing, operations

Congratulations on completing this course!

Now, let's get started with implementing the ideas shared. Go back to the top of this workbook and use the **Next Steps** section from each session as your checklist. For each task, identify who will be responsible, clarify exactly what the task entails and set a deadline for when it will be accomplished. For example, this is the first task from the first session:

Task	Who is responsible?	Deadline
Find out if you are using the most current version of your software – and if not, reach out to update. Be sure to confirm any specifications for hardware/networking and update these as needed.		

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