

Improve Your Practice Production with Strategies for Success

with **Carrie Webber**

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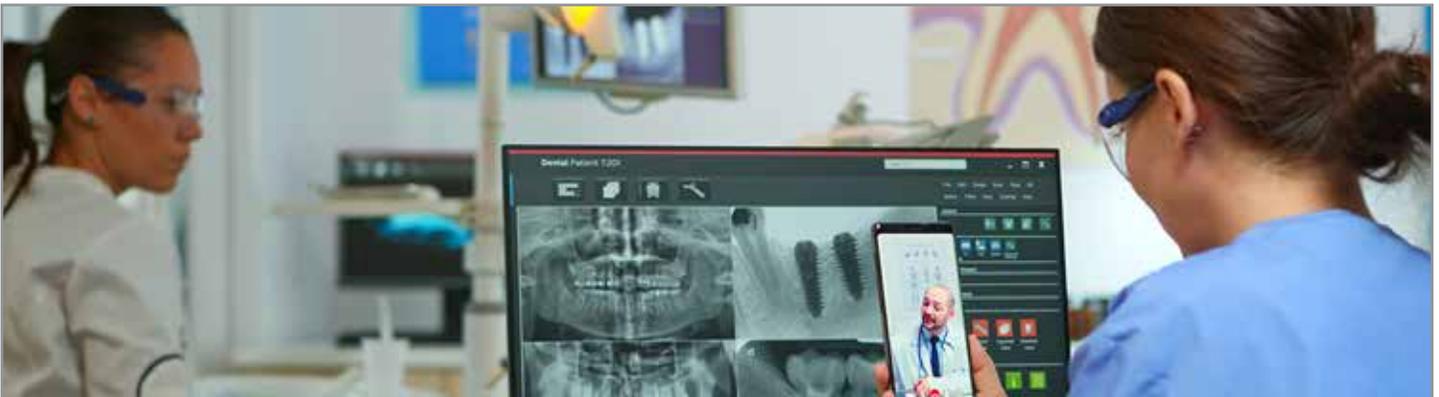
The purpose of the Dental Business Institute Program is to educate, train, and develop entrepreneurial dentists to successfully lead, manage, govern, and grow dental practices of any shape or size from solo practice, to managed group practice, to corporate models.



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Session One: The Critical Factors of the Business of Dentistry

As practice leaders – regardless of your role – it is important to have a clear understanding of the overall health and well-being of your practice. At Jameson, we believe that it is imperative to measure what matters for your ongoing practice growth and health. These aspects of your practice are a combination of tangible and intangible factors. The health of these Critical Factors is what will help you or hinder you now or in the future. If you keep your finger on the pulse of these key performance indicators, cultural factors, and systems, if you work to improve them and if you set goals within them to achieve, you will be able to plan and strategize more effectively and you will find yourself achieving more of the goals that you and your team set for yourselves.



The Critical Factors of the Business of Dentistry Are:

- **Production:** set and pursue production goals.
- **Collection:** are you collecting what you produce?
- **Accounts Receivable:** have systems in place to keep your AR under control and in check.
- **Patient Financing:** have a variety of financial options available for your patients and be clear and prepared to maximize them. Monitor your case acceptance and the utilization of your financing tools, such as CareCredit.
- **Overhead:** Regularly monitor your practice overhead and make sure you are on track to be as profitable as you can be.

Session Two: The Characteristics of a High-Performing Team

There are at least 7 Characteristics that make up a high-performing team:

1. They are unified and aligned with shared Mission, Vision and Core Values
2. Accountability – you can trust your teammates to do the work and do it well.
3. Engagement – everyone is actively contributing toward the practice vision and goals.
4. Attitude – there is an overall positive and productive attitude among team members.
5. Execution – you have processes in place that help drive the goals for the practice forward into action.
6. “Raving Fan” Service – you are committed as a team to the pursuit of excellence in your care and service for your patients.
7. Communication Skills – you are constantly working on and improvement your communication skills with each other as a team and with your patients.

In your team meetings and in your planning for the future as a team, make sure to incorporate effective goal setting. The 5 Steps to Successful Goal Setting are:

1. Write The Goal
2. Design The Plan
3. Determine the Person Responsible
4. Define the Time Frame
5. Evaluate

Session Four: The Keys to Patient Education, Motivation and Activation

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- As you walk a patient through their experience in your practice, or as you are presenting recommended treatment to them, it is important to remember three keys to educating, motivating and activating your patients into treatment:
 - Tools
 - Time
 - Team
 - In marketing, they use a term called the Rule of Seven. Let's think of this term in our communications with our patients. This term states this:
 - A person needs to see, hear, feel or experience a message up to seven times before they are moved to action.
 - If this is the case, we need to think about all of the tools we have available to us, the time that we need to effectively communicate with patients about diagnosed treatment and each team member's role in a patient's understanding, trust, and motivation regarding recommended treatment.

Notes

Session Five: Foundations of Scheduling

Jameson Founder, Cathy Jameson has always said, “a healthy scheduling system is the heartbeat of your practice.” What she means is, if we don’t have a scheduling system in place that can fully support you, your practice and your patients in the best way possible, we will continuously find ourselves falling short of our goals and our vision for our practice.

At Jameson, we recommend the following Essentials of Scheduling:

1. Schedule to a production goal.
2. Schedule Doctor and Assistant time.
3. Maximize your scheduling/practice management software.
4. Detail each appointment.
5. Schedule a variety of procedures throughout the day.
6. Pre-block your schedule and prioritize your time more proactively.
7. Be more intentional about the timing and effectiveness of your hygiene evaluations.
8. Proactively plan for emergencies.

Notes

Session Six: Reducing Broken Appointments and No Shows

Author, James Clear says, “You do not rise to the level of your goals. You fall to the level of your systems.” That could not be truer than within the system of scheduling in dental practices. A healthy schedule that can manage and reduce broken appointments and no shows is one that not only has excellent processes and essentials in place, it also is executed by a team that understands the power of their communication skills and efforts in building the value of the appointments that are being scheduled in the minds of the patients.

Here are steps to help you fill the void and reduce those painful broken appointments and no shows:

1. Enhance your verbal skills.
2. Give your patients a reason to come back.
3. Effectively & consistently confirm appointments.
4. Maximize your technology for education, motivation and confirmation
5. Proactively plan a “move forward” system.
6. Develop a safety net plan for when cancellations and no shows occur.

Notes

Session Seven: Meetings That Matter

Wondering how you are going to make any positive change in your practice or tackle any of the areas we are covering in this training? Meetings Matter!! Prioritizing time in your schedule for connection time as a team to work on systems and skillsets, to set goals and to monitor progress is important for practice growth, for team development and engagement and for your ongoing pursuit of your ideal practice vision. You have to make time to work ON the practice, not just IN the practice.

Here are steps to help you fill the void and reduce those painful broken appointments and no shows:

1. Daily Huddles: 10 minutes every day. Start on time, stop on time. Follow Jameson's recommended agenda to begin and develop an improved version of your own as you become more comfortable in how to have an EFFECTIVE daily huddle. Doing these consistently, doing these right and doing these well will undoubtedly increase your practice productivity.



2. Monthly Team Meetings. This is at least one hour long. This is where you are going to make movement on your goals and work on the areas of your practice or skills of your team that need attention. Be proactive in making sure this is engaging and productive. Create an agenda prior to the meeting. Set expectations of participation and attendance. Involve all team members and give room for discussion, questions and practice!

Productive + Dynamic Team Meetings

- Have a facilitator & a recorder.
 - Have an agenda.
 - Stay on board with the agenda.
 - Keep meeting positive, forward moving, & creative.
 - Start on time. Stop on time.
 - Protect group members from attack - stay positive!
 - Take notes.
 - Keep notes accessible for referral and evaluation.
3. Quarterly Braintrust Meetings. These are longer, more in depth meetings. Often they take place away from the practice or while the practice is shut down so that there are no distractions. This is where you strategize, you bring in experts for training, you do hands-on training with new technology and so on. If you want to move the needle for your practice, giving yourself and your team ample time to become competent with the tools you have, with the verbal skills they need and with the processes that you are trying to put into place will make all the difference.

Notes

Session Eight: Leading Your Practice Forward

How do you as a leader take this information and implement it into your practice and with your team? It takes focus and consistency in these key areas of leadership:

- Setting the Standard with your team
- Reflecting the Standard for your team
- Expecting the Standard from your team

Where to start? Take a moment and rate your practice's level of performance through the lens of what we at Jameson consider some of the key systems of your dental business. Rank yourself from 1 to 10 – 10 being perfect, 1 being non-existent. If you rate yourself a 7 or above, well done! Celebrate the great work you are doing! If you rate yourself less than 7, this is an area that may need to be prioritized and worked on – this can help you build a strategy and prioritization for growth and improvement. Take this exercise to the next step and have every member of your team rate your practice and average the results – this gives you as the leader the gift of perspective from your team. Work together on the areas you identify in need and celebrate the things you are doing!

Notes

25 Management Systems

"The success of your practice is in direct proportion to the success of your systems"

- Cathy Jameson

1. Teamwork	1	2	3	4	5	6	7	8	9	10
2. Effective Communication	1	2	3	4	5	6	7	8	9	10
3. Mission / Vision / Goals – Strategic Planning	1	2	3	4	5	6	7	8	9	10
4. Personnel Management	1	2	3	4	5	6	7	8	9	10
5. Organizational Meetings	1	2	3	4	5	6	7	8	9	10
6. Financing	1	2	3	4	5	6	7	8	9	10
7. Insurance Management	1	2	3	4	5	6	7	8	9	10
8. Collections	1	2	3	4	5	6	7	8	9	10
9. Scheduling	1	2	3	4	5	6	7	8	9	10
10. Overhead Control / Fee Analysis	1	2	3	4	5	6	7	8	9	10
11. Monitors	1	2	3	4	5	6	7	8	9	10
12. New Patient Experience	1	2	3	4	5	6	7	8	9	10
13. Diagnosis / Treatment Planning/ Consultations	1	2	3	4	5	6	7	8	9	10
14. Treatment Coordination and Acceptance	1	2	3	4	5	6	7	8	9	10
15. Full Use of Technology and Equipment	1	2	3	4	5	6	7	8	9	10
16. Patient Education	1	2	3	4	5	6	7	8	9	10
17. Clinical Efficiency / Ergonomics	1	2	3	4	5	6	7	8	9	10
18. Documentation	1	2	3	4	5	6	7	8	9	10
19. Advanced Hygiene Program	1	2	3	4	5	6	7	8	9	10
20. Hygiene Retention	1	2	3	4	5	6	7	8	9	10
21. Sterilization / Infection Control	1	2	3	4	5	6	7	8	9	10
22. Marketing / Practice Building	1	2	3	4	5	6	7	8	9	10
23. 5-Star Customer Service	1	2	3	4	5	6	7	8	9	10
24. Building the Cosmetic Aspect of the Practice	1	2	3	4	5	6	7	8	9	10
25. Leadership	1	2	3	4	5	6	7	8	9	10

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