

Welcome Practice Leaders!!



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Meet The Dental Success Family!



Dental Success Network

 FOA COACHING

By Front Office Academy

 **FrontOfficeAcademy**
By Dental Success Network

What do you want to get out of the meeting this weekend?

What do you want to get out of the meeting this weekend?

Keep Doing:

Stop That Shi*t:

Start Doing:

Scan QR Code
to Submit
Your
Questions



Unveiling The Science of Influence

 FOA COACHING
By Front Office Academy

 **FrontOfficeAcademy**
By Dental Success Network



What is an Office Manager?



TECHNICIAN
BABYSITTER
DILIGENT
EMOTIONAL
INTELLIGENT
WIFE
MOM DAD
FRIEND
OWNER
GIRLFRIEND
DIRECTOR
HUNGRY
PHUNGRY
HARDWORKING
FIREFIGHTER
ACCOUNTANT
COACH
GRIT
GONDS
REIGNITS
RUMBER
LEADER
PET
BOYFRIEND
ORGANIZED
INFLUENTIAL
BOOKKEEPER
HUMBLE
EMOTIONAL
INTELLIGENT
ACCOUNTANT
GRIT
GONDS
RUMBER
LEADER
BOYFRIEND
ORGANIZED
INFLUENTIAL
BOOKKEEPER
HUMBLE

What is an Office Leader?



Develops and
Implement Strategy



Oversee Daily
Operations



Lead/Mentor Team
Members

The office manager plays a critical role in running an efficient dental practice and delivering high-quality patient care.

Develop and Implement Practice Strategies

Lead weekly, monthly and quarterly meetings with a continuous growth and productive mindset.

Develops, implements, and maintains office policies and procedures.

Identifying patient-reported problems and implementing modifications to prevent recurrences.

Oversees Office Marketing and patient retention.

Tracking Practice KPI.

Oversees Daily Operations

Office Manager Training Plan

Packet includes: 30/60/90 game plan, positions checklist & scorecard

Job Description: The office manager's responsibilities include keeping the office running smoothly and efficiently. Additional focuses includes achieving growth and profitability benchmarks while embracing the core values and positive culture of the practice.

Goal: Become fully trained as an office manager, mastering all duties and tasks assigned within 90 days post-employment start date and during the duration of employment.

Office Manager Checklist- 30/60/90 Day Plan to Be Proficient In

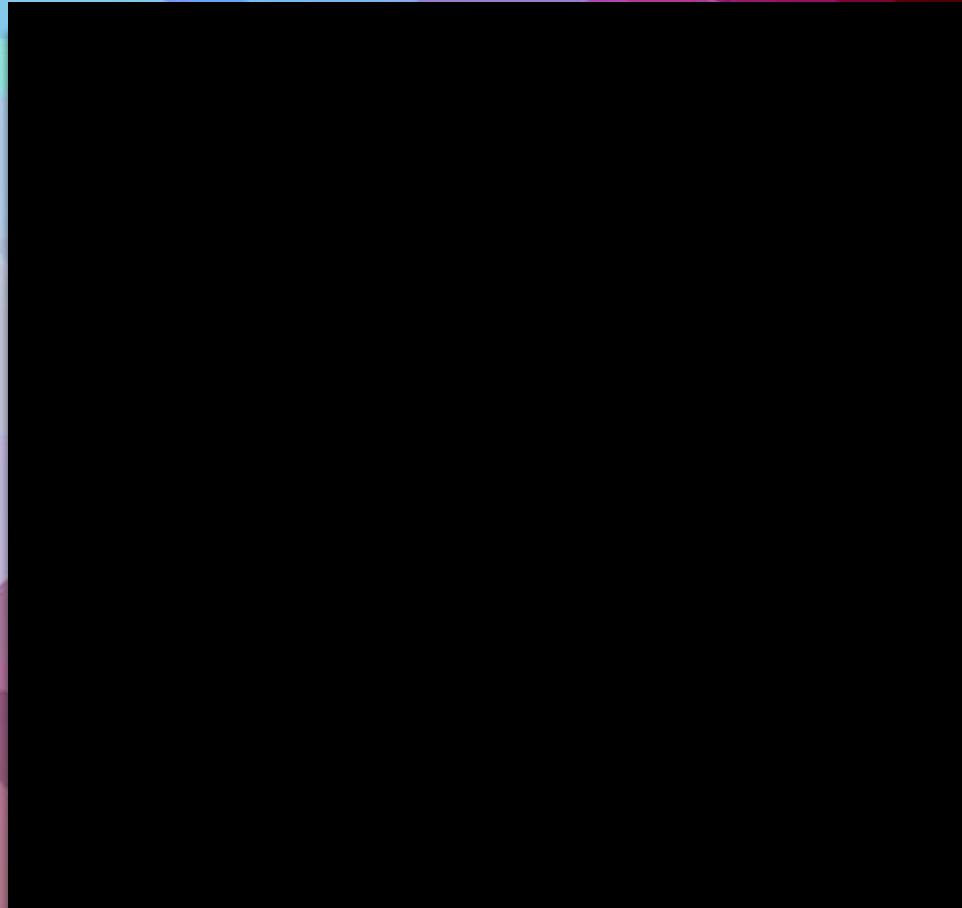
1. Overall office duties
2. Lead morning huddle
3. Run and track all reports efficiently
4. Close out office
5. Schedule Prep

What each task includes:

- Overall Office Duties
 - Arrive 30 minutes prior to first patient
 - Spot check all EOD forms
 - Check office facility to ensure that common areas and departments are organized and cleaned.
 - Review schedule for any conflicts and opportunities
 - Confirm all lab cases in
 - Meet with Dr. prior to morning huddle
- Lead morning huddle and begin and end on time
 - Ensure each team member is prepared and read to participate
 - Ensure that:
 - Same day treatment is prioritized and planned for
 - Recare opportunities are noted and accountability and expectations with team members is reinforced
 - Balances are discussed with accountability for collecting is in place
 - WINS for the office are highlighted daily
 - Announcements
- Tracking:
 - Production
 - Collections
 - Reappointment percentages
 - Attrition
 - Case acceptance
 - Same day treatment
 - New patients and referrals
 - Broken appointments
 - Unconfirmed appointments 2 days out
 - AR Reports- 30, 60, 90 days
 - Hygiene production (3x pay?)

- Manage Patient Scheduling
- Support Business Goals and Financial Expectations
- Manage Office Budget
- Oversee Hiring/Firing
- Ensure Sufficient Personnel For Daily Operations
- Manages the Financial health of the practice
- Oversees Lifetime Patient Experience

Do you have an executive presence?



Leadership Influence

Empower

Give your team members the tools and resources to execute their daily tasks efficiently.

Influence

Influence team members by actively listening, streamlining workflows and communications.

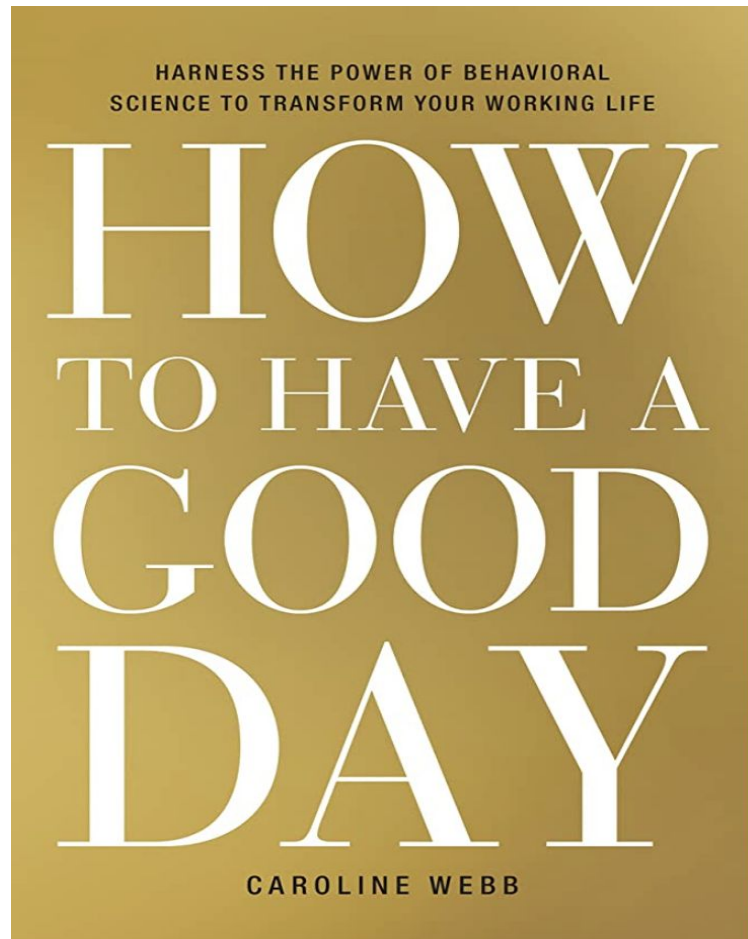
Inspire

Inspire team members to collaborate, innovate and take calculated risks.

Emotional Intelligence

Master emotional regulations skills.

How can you communicate and influence your team?



“Ensuring that colleagues feel that workplace decisions are fair not only keeps their reward systems happy, but leaves people with more mental energy to focus on other things.”
-Caroline Webb

The Two System Brain



The Deliberate system is the part of your brain that engages in thoughtful, conscious decision-making and is responsible for planning, analyzing, and strategizing.

When you use your Deliberate system, you actively focus on specific tasks, set goals, and make intentional choices.

Think about planning a trip, answering emails or working on a project.

The Two System Brain



The Automatic System is the part of your brain that operates on autopilot, handling routine tasks and responses with minimal conscious effort.

This system is responsible for everyday habits, reactions, and behaviors that have become ingrained through repetition and experience.

Think about talking on the phone and walking or driving home from work.



How Does This Affect Your Day to Day?

The **delibate system** has limited capacity and can only focus on one thing at a time

The **automatic system** can alter your attitude and reactions to tasks that you have deemed irrelevant or low priority

Deficient Mental Energy

➤ When multitasking, we use more mental energy switching from task to task.

➤ Increasing mistakes, and slowing down decision making.

➤ Low mental energy can send the automatic system into fight, flight or freeze.

Decision Fatigue!



Defensive Mood



Defensive mood involve behaviors and thoughts where a person is overly protective of themselves, quick to justify their actions, and slow to accept external suggestions or criticisms.

When someone is in a defensive mood, our cognitive biases and emotional reactions can skew our perceptions and lead to less effective communication and decision-making.

What Triggers Defensive Mood?



Defensive Mood can be triggered by stress, perceived threats, or emotional challenges, leading us to react defensively without much rational consideration.

In a defensive state, our **automatic system** is trying to protect us, often resulting in quick, protective responses to feedback or situations that might actually benefit from a more measured, thoughtful approach

When someone is in defensive mood, their automatic response can cause us to filter out what we hear or see, triggers fast thinking and activates our Freeze, Flight or Fight response.

Discovery Mood



When in the discovery mood, we are open, curious, and eager to explore new ideas, insights, and different perspectives. This mood fosters learning and growth by encouraging a more expansive, inclusive view of the situations we encounter.

By cultivating a discovery mood, individuals can transform their approach to daily challenges and interactions, leading to more productive and positive outcomes.

The Benefits of Being in Discovery Mood



- It enhances creativity and problem-solving by allowing for a broader range of solutions to be considered.
- It improves interactions and relationships, as it leads to better listening skills and a greater willingness to understand others' perspectives.
- It contributes to personal and professional growth by facilitating continuous learning and adaptation.

Avoid Decision Fatigue

- **Prioritize Tasks:** Identify the most important and time-sensitive tasks. This can include patient scheduling, inventory management, and staff coordination.
- **Time Blocking:** Allocate specific time blocks for different types of tasks. For instance, set aside dedicated periods for patient appointments, staff meetings, Training and Development and administrative work.
- **Delegate Wisely:** Understand your team's strengths and weaknesses, and delegate tasks accordingly. Empower your team members to take ownership of their responsibilities.





Intentional Goal Setting

Aim: What matters most? What do I want to get out of this?

Attitude: What mood is dominating my thought? Do they help with what matters most? If not, can you push them aside?

Attention: Where do you want to direct your focus?

Assumption: What negative expectations do you have going into a task or conversation?



Huddles for a Hella Good Day

*Empower your team with the
info and energy for a
productive day*

What is the Morning Huddle? Why do we need one?

An ENGAGING Morning huddle is the best way to get our day off to the right start by sharing important information that will empower your team to make great decisions and motivate them to work as a collective to reach the day's goals.

Often, this meeting isn't held at all or is lacking the key information people need to make a difference. When run incorrectly, it becomes a boring review of the day's schedule where most team members are either almost falling asleep or paying the bare minimum of attention.

My intention today is to show you how to create and run an efficient morning huddle that **includes the key information your team needs to energize them to make an impact on your day.**



Components to a Successful Morning Huddle

- Starts on Time and Ends on Time
- Everyone has a key role and gets to speak (rotating is okay)
- Key information regarding patient care is shared
- Key information around scheduled production vs. goal per provider is shared
- Each team member leaves huddles understanding how they can positively affect the day
- Core values are celebrated with a team member shoutout

Morning Huddle Topics: Separate your huddle into a few distinct sections

Section 1: Recap of Yesterday's Wins

- Overall office production vs goal with any additions highlighted and celebrated
- how many patients accepted and scheduled for care (both as a number and percentage)
- Hygienists report on:
 - hygiene KPIs you typically track including:
 - % of fluoride acceptance
 - % of patients who pre-booked their next hygiene visit
 - % SRPs diagnosed that scheduled



Morning Huddle Topics: Separate your huddle into a few distinct sections

Section 2: Today's Patients of Note

- New patients and emergency patients' chief concerns
- any medical issues or pre-meds to note
- patients on both schedules that have a need to schedule with either hygiene or doctor.
- Past Due balances to be collected to ensure they are discussed before the patient gets brought to the back



Morning Huddle Topics: Separate your huddle into a few distinct sections

Section 3: KPIs and how we can move the needle!

- Review today's scheduled production per provider vs each provider's goal
- Highlight opportunities for the team to help that provider hit goal if scheduled under goal
- Best for each hygienist to report on their own column and each doctor's main assistant can report on their numbers and the same day treatment opportunities
- Hygiene can look for opportunities in fluoride acceptance, sealants, nightguards and potential perio diagnosis

Time	Doc 1	Doc 2	Hyg 1	Hyg 2
8am	Gonzalez, Brennan #29-CrCrnSeat DOC1 \$0.00	D'Amaro, Marcy' Marceline #3-MOD-C3(P) DOC2 (HYG2) \$204.00	Adair, Elsa PerEx, Pro HYG1 (DOC1) \$137.00	Davidson, Hera PerEx, Pro HYG2 (DOC2) \$137.00
9am	NP-Justino, Hansel CmpEx, 4BW, Pano, Pro, Flo DOC1 \$323.00	Vine, Marcella #3-E DOC2 (HIV)	King, Zelda PerEx, Pro HYG1 (DOC1) \$137.00	Heder, Orlando PerEx, Pro HYG2 (DOC2) \$137.00
10am	NP-Mendes, Philomena CmpEx, 4BW, Pano, Pro, Flo DOC1 \$323.00	Hackley, Vanessa #12-MOD-C3(P), #13-MOD-C3(P) DOC2 (HYG2) \$408.00	O'Hooligan, Devin PerEx, Pro HYG1 (DOC1) \$137.00	Yu, Mei PerEx, Pro HYG2 (DOC2) \$137.00
11am	Wilson, Moira Consult	Gracey, 'Indy' Indiana #3-MOD-C3(P), #4-OL-C2(P) DOC2 (HYG2) \$529.00	Zavala, Esther PerEx, Pro HYG1 (DOC1) \$137.00	Rivera, Avery PerEx, Pro HYG2 (DOC2) \$137.00
12pm				

Morning Huddle Topics: Separate your huddle into a few distinct sections

Section 4: Core Value Shout out/Culture Celebration

This is way to boost morale and celebrate personal contributions that will leave your team members feelings appreciated and motivated. This could look like Core Value being lived by a team member in or out of the office and brought up by another team member, or a moment of gratitude for a team member who went above and beyond.



Example Morning Huddle Sheets

Example Huddle #1:

Morning Huddle Sheet

- Today's Production and Collections: \$_____ / \$_____
 - Opportunities for Same Day Treatment:
 - Name and Plan: _____
 - Name and Plan: _____
 - Name and Plan: _____
- Patients that have special items to discuss:
 - Name and Item: _____
 - Name and Item: _____
- Patient Balances to Discuss:
 - Name and Plan: _____
 - Name and Plan: _____
- Night follow-up
 - Employee/ Issue: _____
 - Employee/ Issue: _____
 - Employee/ Issue: _____
- Handoffs
 - Do we need improvement or were they successful yesterday?
 - Employee/ Issue: _____
 - Employee/ Issue: _____
- Production- Where are we?? Have Julie mark the board (Make sure she marks the board)
- Reviews- How many? Any people by name?
- Anything else that we need to discuss? (Implants, lab cases in, announcements, meetings, etc.)

Morning Huddle Sheet

YESTERDAY'S RESULTS

Actual Production: vs Goal:

Patients seen:

Yesterday's Hygiene Reappointment Rate: *(Patients pre booked for next prophylaxis/hygiene patients seen)*

Yesterday's Tx Plans

	How many?
<u>Presented</u>	
<u>Accepted</u>	
<u>Not scheduled</u>	

Past Due balances collected (# of patients and Amounts):

Outbound Call Efforts

of Appts added/ # of calls made per FD

- 1.
- 2.
- 3.
- 4.

TODAY'S PLAN:

Scheduled Production: _____ vs Goal: _____

Scheduled Production by Provider:

- 1.
- 2.
- 3.

Same Day Tx Opportunities

New patients:

Past Due Balances to Collect (who, how much?):

Unscheduled Family Recare Opportunities Today:

All lab cases here?: Yes or No

RECAP OF MONTH

Production Month to Date:

Trending: _____ vs Monthly Goal: _____

Announcements/Wins:

Areas for Improvement:

Leading by example (core value shout out)

Example Morning Huddle Sheets

Example Huddle #2

15 min Morning Huddle

Yesterday:

Yesterday's production vs the daily production goal: _____

Yesterday's collections: _____

Trends:

Trending Collections vs monthly goal: _____

I

Trending Production vs monthly goal: _____

Case Acceptance:

Diagnosed treatment from yesterday (\$ amount): _____

Tx Dollars Scheduled Yesterday: _____

% of treatment plans accepted (scheduled appts/total # of new/existing patients given treatment plans): _____

Today:

Net production Scheduled vs Daily Goal : _____

Go through Today's schedule to review:

Booking concerns or any other issues with the schedule for that day

Opportunities for same day tx (doctors present for their own schedules and hygienists presenting for theirs)

Past Due Balances

Follow up items / reminders for the team

Example Morning Huddle Sheets

Example Huddle #3

Importance of Team Participation



- If your team members are bored to the point of tuning out and missing the important info presented in huddle, then the huddle is ineffective and useless
- We need team members listening and **ENGAGED**
- How do we accomplish this? Everyone must have a role to play! Presenting, giving a culture shout out, or bringing up an issue and proposed solution from the previous day are all ways your team members can contribute to an active huddle
- If your team is too large for everyone to participate every day, you can rotate

Training your team to prep and present in Huddle

1. Set CLEAR expectations of what to present and who will be presenting it when
2. Teach them how to pull the data in an efficient manner. Schedule a by department training on this!
3. Practice presentation. Especially for team members who are timid, this may not come naturally. But it is our job as their lead to inspire them to step up and lead
4. Give positive feedback! Look for reasons to celebrate someone's improved presentation
5. Provide clarity of who is speaking and when, and who is responsible for updating the break room stats board
6. Bring Energy to the start fo your day. Let your team members rotate in picking background music, pass a silly baton around as your rotate speakers, randomly bring fancy donuts, mix it up and HAVE FUN.





Monthly Meetings to Move Your Team

Monthly Meetings: Who, What, When, Where and Why

Who? The WHOLE team! Associate doctors, remote team members, and all in office team members should attend. Meeting falls on a day they don't work? Require their in person attendance or that they sit down to review the notes with the leader at a later date.

What? This is a meeting to set new monthly goals, solve problems, provide training, and recap past month's results.

When? It should happen on the first day of the new month or as close to that date as possible. First thing in the morning with a delayed start, or during lunch time with an extended lunch works best. 90 mins to 2 hours should be blocked to ensure you don't run short on time.

Where? Generally at the office in the the most comfortable space for the whole team to fit

Why? To achieve desired results, we all must row in the same direction. We need clarity of where we are heading and how we plan to get there. We need open, healthy debate to solve issues in the office. We need our team to be continually learning and growing.



PITA *(not the delicious bread kind)*

- Presence
- Intention
- Time
- Agenda



Meeting Rules for Meetings that Rule

- **Attendance:** Everyone on the team joins. Even if it's not a day someone typically work, meetings are mandatory (and paid time of course). We all must be sitting and ready on TIME for an on time start.
- **Active Listening:** Everyone on the team is a key player in their role. We couldn't function without any 1 person. That means we need the active attention and ideas of each person on the team. Everyone will be given an agenda with room for notes. It should be expected that the team member bring a clipboard and pen
- **Treat others how we want to be treated:** we must all listen to each other, without interrupting. We must consider everyone's ideas. And we must show respect above all else.
- **Bring a Solution oriented mindset:** Complaining about a problem is welcome, as long as you can propose a potential way to solve it.
- **Fuel us:** Going to make your team sit through a 2 hour brainstorming session? Feed them! Vary the breakfast or lunch menu and let them pick the restaurant so the team gets excited for meeting day.

Get your Team's Input!

It's not a team meeting without the team's help on the agenda! A few days prior to your scheduled meeting, set a deadline for your team to submit topics they would like to discuss in the open forum. This ensures:

- That you have time to add these points to the agenda
- That no one feels like they will be judged for being the person to bring up an issue in front of everyone. This practice anonymizes all topics so everyone feels comfortable.
- Your team has time (at least 1 day) to see the agenda in advance and start to organize their thoughts on the Open forum agenda items and think of potential solutions
- You get a complete list of the issues to resolve in the office

Having a clear Agenda

- It is vital to have a clear agenda to keep us on topic and organized
- At least one day in advance of the meeting, hand out typed agendas with space for notes and the expectation that our teams come ready with ideas/notes to contribute
- You can try to estimate times per section or just run a few meetings in this fashion and see how the time is being distributed. It's important to keep the meeting on task and moving along so there's time to get through all topics



Sample 2 hour Meeting agenda:

- 12:00 - 12:05 pm: everyone gets food and settles in
- 12:05 - 12:15 pm: Recap of previous month's results vs goal
- 12:15 - 12:30 pm: New month's goals and initiatives on how to get there
- 12:30 - 1:15 pm: Training/Learning/Role Playing exercises
- 1:15 - 1:50 pm: Open Forum Discussion-solving issues as a team
- 1:50 - 2 pm: Recognition / Shout outs

Monthly Meeting Structure

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 - Net Production
 - Collections
 - Collections : Production Ratio
 - Case Acceptance %, 3rd party financing applications
- Share the new month's Goals for the same KPIs and any Special one time goals or Initiatives.
 - *Example of Special Goal: Start 8 Invisalign cases when previously we have been averaging 4 starts per month.*
- Spend 30-45 minutes TEACHING, PRACTICING or CALIBRATING your team.
 - *Example: Full team Occlusion training so everyone feels comfortable speaking about Invisalign from a clinical perspective*
- Open Forum: Go through each topic submitted by team members. Define the problem clearly and work to solve each one as a group.
- Recognition or Culture Shout Outs- praise publicly any personal or professional triumphs of your team members.

Past Month's Results

Exact KPIs might vary but generally we are always look at:

- **Net Production** - in Production and Income Report vs. Goal
- **Collections**- in Production and Income Report vs. Goal
- **New Patient total** - found in Reports- Lists - New Patients vs. previous month and Year Over Year
- **Case Acceptance %s**- both as dollars accepted : dollars treatment planned and patients scheduled : patients treatment planned (found in reporting software)
- **New Google Reviews** added and overall rating (if changed)
- **Third party financing applications** and utilization- good indicator of how often we are aiming for complete case acceptance
- Any special initiatives: Invisalign starts, implants, all-on-x cases sold, pre-booking goal hit for hygiene, fluoride acceptance etc



New Month's Goals: How to calculate them

Net Production: Look at the trend in the last 3 months and the seasonality of that month. Always aim for 5% above those numbers (or more if the upward trend is greater). *Example: Last 3 months, you have produced \$120k, \$125k and \$130k. Seasonally it's an average month. Average last 3 months and multiply by 1.05 (5% growth) = new goal of \$131k*

Collections: Aim should always be 100% of rolling three months' average production. *Above example collections goal = 125k*

Case Acceptance %: look for growth from where you are already at, but some standard goals to strive for are 85% of total patients move forward with some treatment and 35% of dollars treatment planned are scheduled/completed.

Reviews: this may or may not be a focus depending on how high you show up already and how many reviews you already have, but it's always good to keep generating new, genuine reviews. 3-4 new reviews a week is a great place to start.

Third party financing applications: this will be based on how many large treatment plans we present on a daily basis. A good goal would be $\frac{1}{3}$ of medium to large treatment plans (over \$2500) are applying for some kind of assistance. This measure is an indicator of how often we are going for FULL case acceptance.

New Monthly Make-it-Happen Goal: whatever your next Rallying Cry focus is- increase fluoride acceptance from 40% to 65%? Start 4 All-on-X Cases? Start 10 Invisaligns? The world is your oyster. Get the team HYPED to hit it.

Training Topic- relevant, participatory, useful

- This should change from month to month depending on the needs of the team (relevant)
- Can involve role playing, departmental break out sessions, or a whole team topic
- Can be a soft skill like phone skills, better handoffs, creating urgency, how to build rapport with the patient, or something more black and white like calibrating on how to explain procedures, talking to patients about occlusion, or asking for referrals or reviews
- Rotate who teaches- you can bring in outside vendors for learning when appropriate or if you have a team member who's passionate about a certain topic, allow them to step up and do the teaching.
- Try to aim for it to be participatory and involve practicing via role playing when possible



Open Forum Session: Get everyone talking!

Recap the Only Rule: you can complain as long as you propose at least ONE possible solution.

Open Discussion of Each Topic: First work to accurately define the problem and what's causing it, then start sharing ideas on how to fix it. Encourage all ideas! If your team is shy to speak, encourage them with praise: *“You guys do these jobs every day, no one is going to have a better idea on how to solve this issue than you will!”*

Stoke a Healthy Debate: Encourage your team to question one another, respectfully. Try to poke holes in the ideas and play devil's advocate. This is how we get the best thought out solutions.

Coming to Consensus: Once all ideas have been thrown out for how to resolve an issue, list the potential solutions again. You can guide the team towards the solution you think is best or take a vote on what to try. Even if there are team members who feel that solution won't work, build consensus by asking them to try it for one month. After one month, you can reassess at the next meeting if it's working well or needs to be tweaked or scrapped altogether.

Coming to Consensus: How to Get Team Buy-in

Is it hard to get your team on the same page? Have lots of strongly opinionated leaders on your team? Remember this is ultimately a GOOD thing that you have passionate people that care deeply about the outcome. How do we take this passion and channel it towards one solution?

How do we create buy in?

1. Consider ALL ideas thoroughly. Your team will be more likely to buy into a solution they felt they were a part of creating, even if their idea didn't ultimately win out. People want to be HEARD.
2. Ask for a trial period. 2 weeks to a month is typically enough time to see if a new process is working.
3. Get a champion of that solution to help with the documentation and training on the new process. Again, elevating our team to ensure they care about the outcome is the best method.
4. Schedule a time to assess how the new process is working. Welcome open and honest feedback. Ask for data of why it's working or not in advance.

Incentives: Using friendly competition or Team Prize to light the fire

Contests with prizes (either group or individual) can be a fun way to motivate your team for a one time incentive.

Use a contest strategically to show your team what their made of and reward their hard work!

Bonus if you can turn the prize into a team event that strengthens your culture and builds more camaraderie.

Try to avoid complacency by running a contest for too long or creating a bonus program they come to expect as part of their income

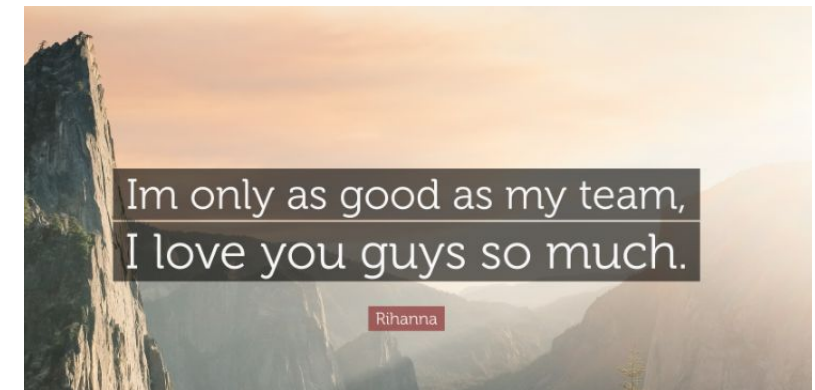
Don't reward mediocrity. Set the goal high enough that they have to work hard and come together as a team to make it happen!



Feeling the Post-Meeting Warm Fuzzies

How should your team feel at the end of your team meeting?

- Energized and excited! Ready to get back to it and crush their goals.
- Clear on the new month's goals and how they can individually help the team get there
- Grateful to be a part of this team/culture: where wins of all kinds are celebrated, healthy debate is encouraged, everyone is listened to and has their opinions respected and objectives are CLEAR.
- Not hungry (you should have fed them something delicious)





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 - *Example of Special Goal: Start 8 Invisalign cases when previously we have been averaging 4 starts per month.*
- Spend 30-45 minutes TEACHING, PRACTICING or CALIBRATING your team.
 - *Example: Full team Occlusion training so everyone feels comfortable speaking about Invisalign from a clinical perspective*
- Open Forum: Go through each topic submitted by team members. Define the problem clearly and work to solve each one as a group.
- Recognition or Culture Shout Outs- praise publicly any personal or professional triumphs of your team members.

Past Month's Results

Exact KPIs might vary but generally we are always look at:

- **Net Production** - in Production and Income Report vs. Goal
- **Collections**- in Production and Income Report vs. Goal
- **New Patient total** - found in Reports- Lists - New Patients vs. previous month and Year Over Year
- **Case Acceptance %s**- both as dollars accepted : dollars treatment planned and patients scheduled : patients treatment planned (found in reporting software)
- **New Google Reviews** added and overall rating (if changed)
- **Third party financing applications** and utilization- good indicator of how often we are aiming for complete case acceptance
- Any special initiatives: Invisalign starts, implants, all-on-x cases sold, pre-booking goal hit for hygiene, fluoride acceptance etc



New Month's Goals: How to calculate them

Net Production: Look at the trend in the last 3 months and the seasonality of that month. Always aim for 5% above those numbers (or more if the upward trend is greater). *Example: Last 3 months, you have produced \$120k, \$125k and \$130k. Seasonally it's an average month. Average last 3 months and multiply by 1.05 (5% growth) = new goal of \$131k*

Collections: Aim should always be 100% of rolling three months' average production. *Above example collections goal = 125k*

Case Acceptance %: look for growth from where you are already at, but some standard goals to strive for are 85% of total patients move forward with some treatment and 35% of dollars treatment planned are scheduled/completed.

Reviews: this may or may not be a focus depending on how high you show up already and how many reviews you already have, but it's always good to keep generating new, genuine reviews. 3-4 new reviews a week is a great place to start.

Third party financing applications: this will be based on how many large treatment plans we present on a daily basis. A good goal would be $\frac{1}{3}$ of medium to large treatment plans (over \$2500) are applying for some kind of assistance. This measure is an indicator of how often we are going for FULL case acceptance.

New Monthly Make-it-Happen Goal: whatever your next Rallying Cry focus is- increase fluoride acceptance from 40% to 65%? Start 4 All-on-X Cases? Start 10 Invisaligns? The world is your oyster. Get the team HYPED to hit it.

Training Topic- relevant, participatory, useful

- This should change from month to month depending on the needs of the team (relevant)
- Can involve role playing, departmental break out sessions, or a whole team topic
- Can be a soft skill like phone skills, better handoffs, creating urgency, how to build rapport with the patient, or something more black and white like calibrating on how to explain procedures, talking to patients about occlusion, or asking for referrals or reviews
- Rotate who teaches- you can bring in outside vendors for learning when appropriate or if you have a team member who's passionate about a certain topic, allow them to step up and do the teaching.
- Try to aim for it to be participatory and involve practicing via role playing when possible



Open Forum Session: Get everyone talking!

Recap the Only Rule: you can complain as long as you propose at least ONE possible solution.

Open Discussion of Each Topic: First work to accurately define the problem and what's causing it, then start sharing ideas on how to fix it. Encourage all ideas! If your team is shy to speak, encourage them with praise: *“You guys do these jobs every day, no one is going to have a better idea on how to solve this issue than you will!”*

Stoke a Healthy Debate: Encourage your team to question one another, respectfully. Try to poke holes in the ideas and play devil's advocate. This is how we get the best thought out solutions.

Coming to Consensus: Once all ideas have been thrown out for how to resolve an issue, list the potential solutions again. You can guide the team towards the solution you think is best or take a vote on what to try. Even if there are team members who feel that solution won't work, build consensus by asking them to try it for one month. After one month, you can reassess at the next meeting if it's working well or needs to be tweaked or scrapped altogether.

Coming to Consensus: How to Get Team Buy-in

Is it hard to get your team on the same page? Have lots of strongly opinionated leaders on your team? Remember this is ultimately a GOOD thing that you have passionate people that care deeply about the outcome. How do we take this passion and channel it towards one solution?

How do we create buy in?

1. Consider ALL ideas thoroughly. Your team will be more likely to buy into a solution they felt they were a part of creating, even if their idea didn't ultimately win out. People want to be HEARD.
2. Ask for a trial period. 2 weeks to a month is typically enough time to see if a new process is working.
3. Get a champion of that solution to help with the documentation and training on the new process. Again, elevating our team to ensure they care about the outcome is the best method.
4. Schedule a time to assess how the new process is working. Welcome open and honest feedback. Ask for data of why it's working or not in advance.

Incentives: Using friendly competition or Team Prize to light the fire

Contests with prizes (either group or individual) can be a fun way to motivate your team for a one time incentive.

Use a contest strategically to show your team what their made of and reward their hard work!

Bonus if you can turn the prize into a team event that strengthens your culture and builds more camaraderie.

Try to avoid complacency by running a contest for too long or creating a bonus program they come to expect as part of their income

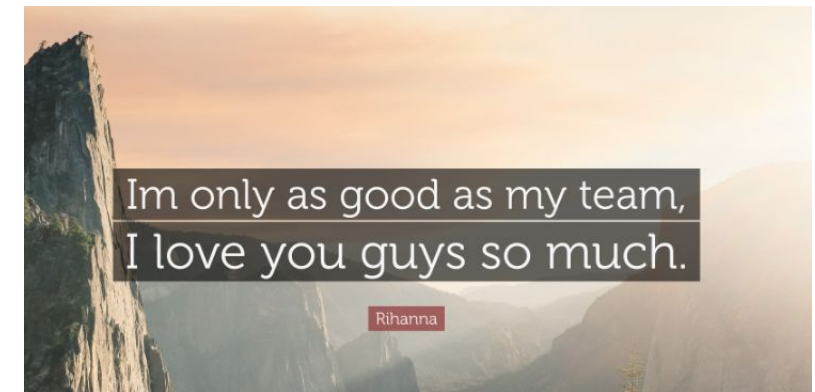
Don't reward mediocrity. Set the goal high enough that they have to work hard and come together as a team to make it happen!



Feeling the Post-Meeting Warm Fuzzies

How should your team feel at the end of your team meeting?

- Energized and excited! Ready to get back to it and crush their goals.
- Clear on the new month's goals and how they can individually help the team get there
- Grateful to be a part of this team/culture: where wins of all kinds are celebrated, healthy debate is encouraged, everyone is listened to and has their opinions respected and objectives are CLEAR.
- Not hungry (you should have fed them something delicious)



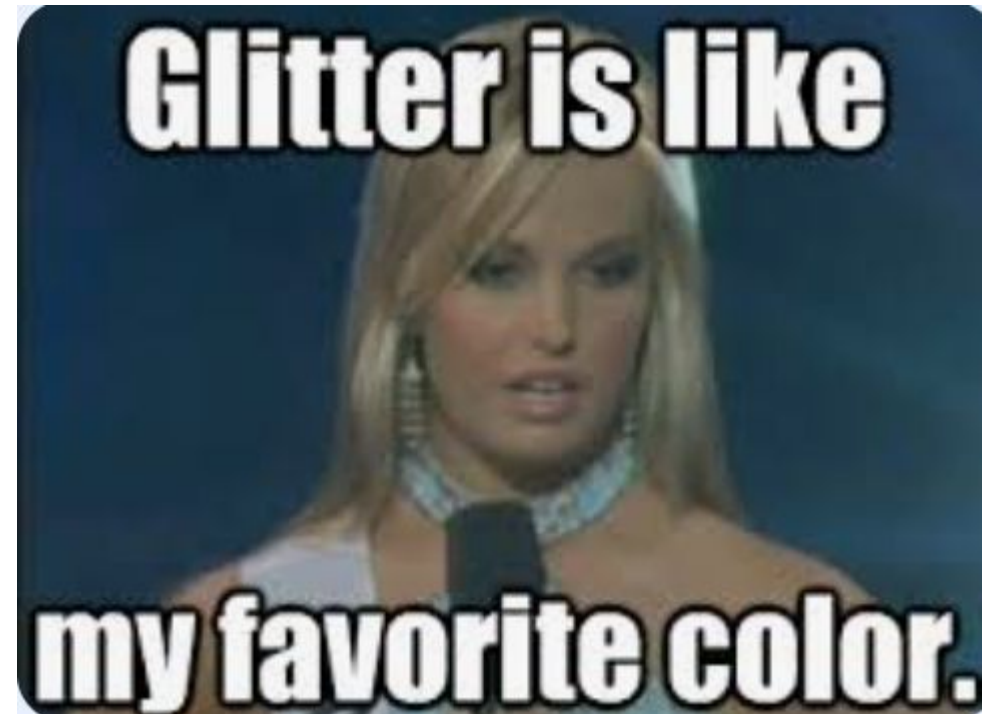
Visual Reminders- Posted same day after meeting

Get your new Month's Goals onto a poster or white board and Make it CUTE!

We want our team to smile when they look at it.

Think glitter, colored markers, stickers, whatever your inner 4 year girl would like, do that!

Put it in an area your team members will see it every day, multiple times per day.



Scheduling Monthly Meetings in Advance

Make sure your calendar and practice management software is marked with the dates of the team meetings for at least the next 3 months. This ensures we don't forget and accidentally miss a meeting.

Block the schedule in advance so patients don't need to get moved

Communicate the dates and times clearly to the team well in advance

Try to do it on the same date and time each month if possible, to create consistency. For example: 1st of the month from 12 noon- 2 pm



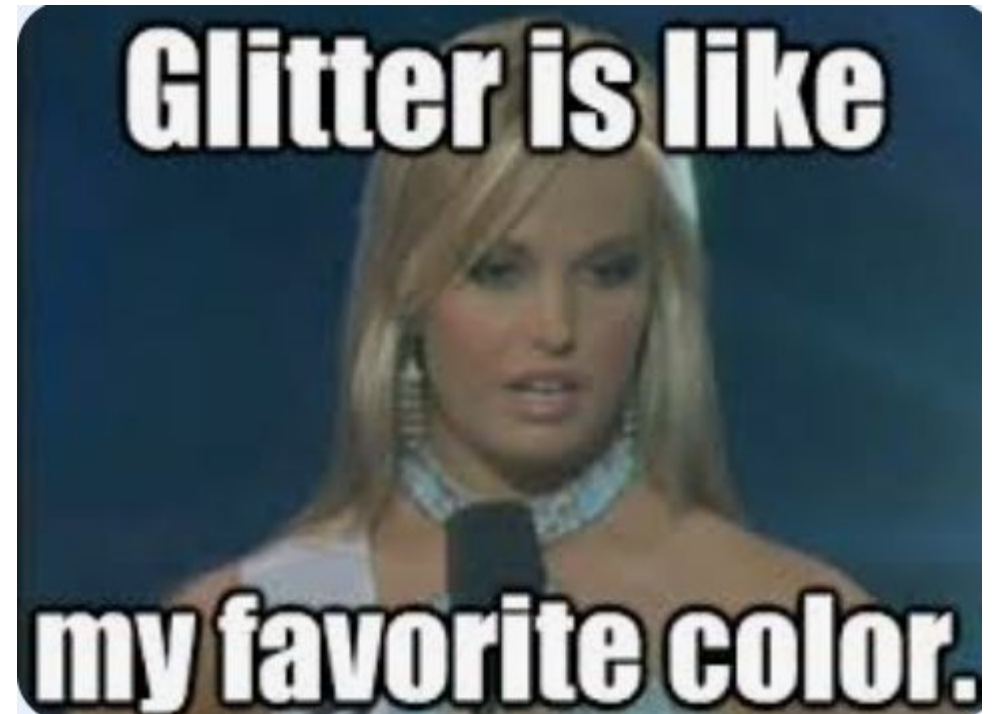
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Flex

DENTAL SOLUTIONS

FOA OM Conference 2024



Who is Ashley?

- I worked in dental practices for over 10 years before coming to Flex
- I used OD + e-services and made the change to Flex
- As Product Owner, I spend most of my days making sure that what we build actually meets client needs/expectations and isn't just checking a box
- I live in Scottsdale, AZ and spend my non-working hours hiking through the desert!



Who is Flex?

- Founded in 2018 by a dentist and her husband
- Focused solely on integration with Open Dental
- Training & Sales teams comprised largely of former dental office team members
- Our mission: To be the only other software Open Dental practices and their patients need to thrive



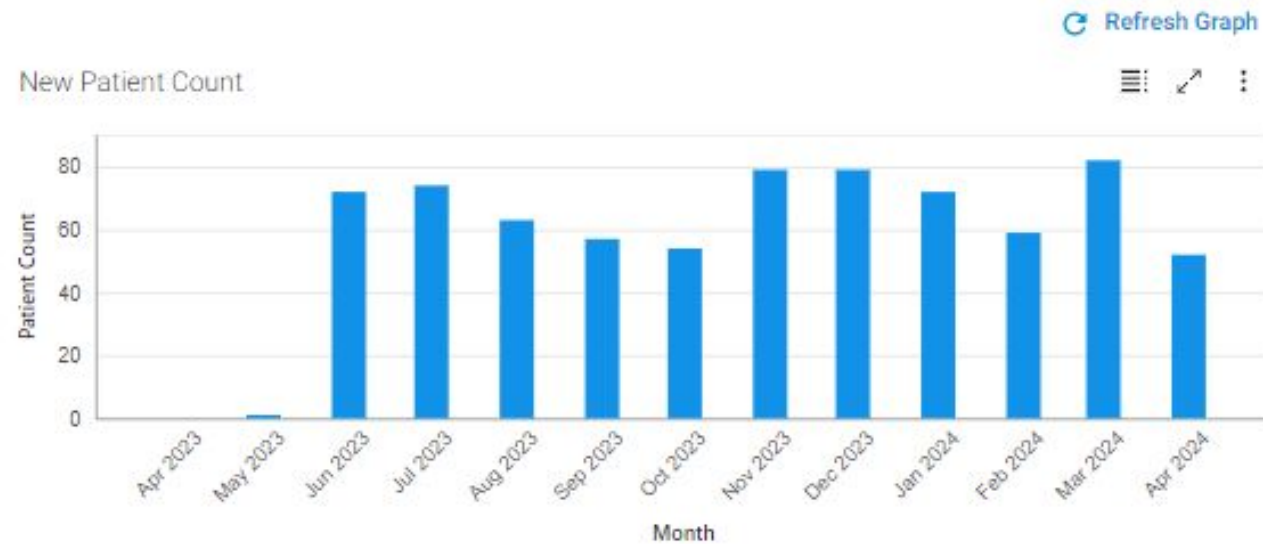
How can Flex help with monitoring practice health?

- Insights reports allow you to get a 10,000 foot view to ensure that the practice is heading in the right direction
 - Highlights knobs to turn for improvement
 - Provider level distinction
- Huddle report gives a closer view to monitor progress day-to-day and month-to-date



Insights Reports

- New patient flow on track? A good bench mark is **25 NP/month/full time dentist**
 - Counts the number of new patients that completed an appointment in your practice in a given month
 - Can we use the Patient List to send a message thanking them for trusting us with their dental care and perhaps share our referral program for their friends/family?
 - Do we have goals for new patients by providers to ensure NP flow is distributed as intended?
 - Do we see a drop at a certain time each year where we can be proactive in marketing campaigns to fill those lighter months?



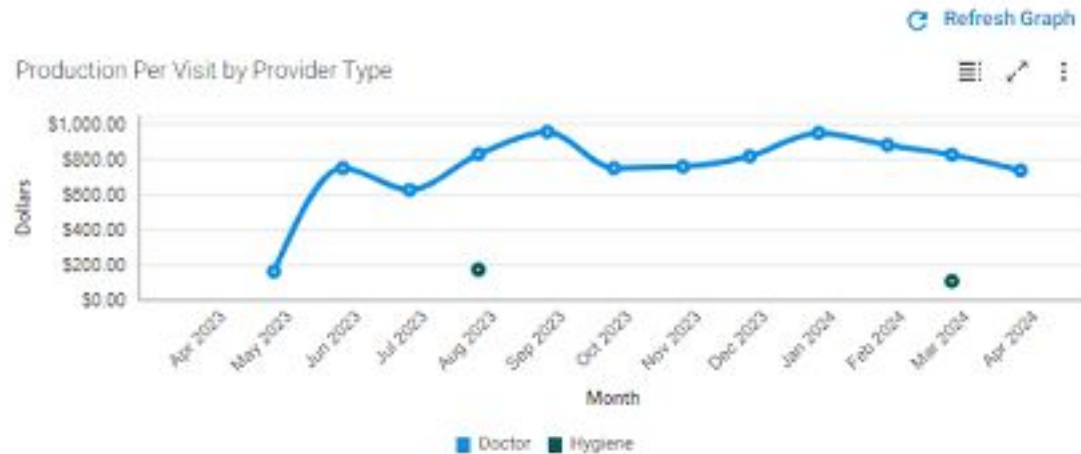
Insights Reports

- Reappointment rate on track?
 - Tracks how many patients are leaving the practice without their next appointment scheduled
 - A higher rate here is optimal
 - Any providers falling short?
 - Can we use the Patient List to text the patients who need to get scheduled?
 - Do we have unscheduled treatment reminders going out automatically to assist here too?



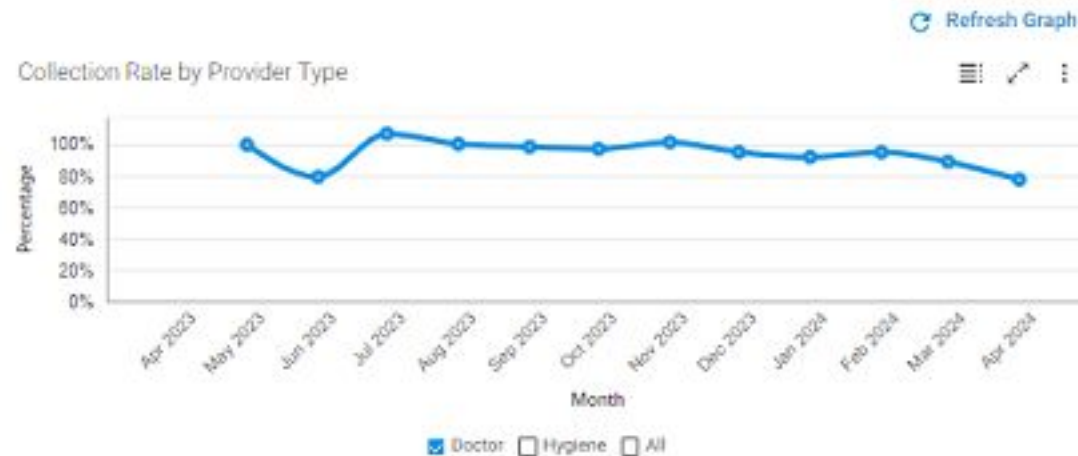
Insights Reports

- Production per visit on track?
 - This tracks the total amount of adjusted production in a given month by the count of appointments
 - We want to make sure we're working smarter not harder and making appointments more productive on average over time
 - Are individual providers performing well?
 - This can be helpful in hygiene too



Insights Reports

- Collection rate on track? **Benchmark is 98% or above**
 - Any providers falling short? This can be helpful to track if certain team members are assigned to specific providers.
 - If you're below the benchmark, how can you make paying more convenient for patients? Online payments? Payment arrangements? Third party financing?
 - Flex can send bulk and automated statements (in beta!) to patients when they have balances in OD which can be very helpful in boosting your collection rate in a way that requires minimal effort from the team!



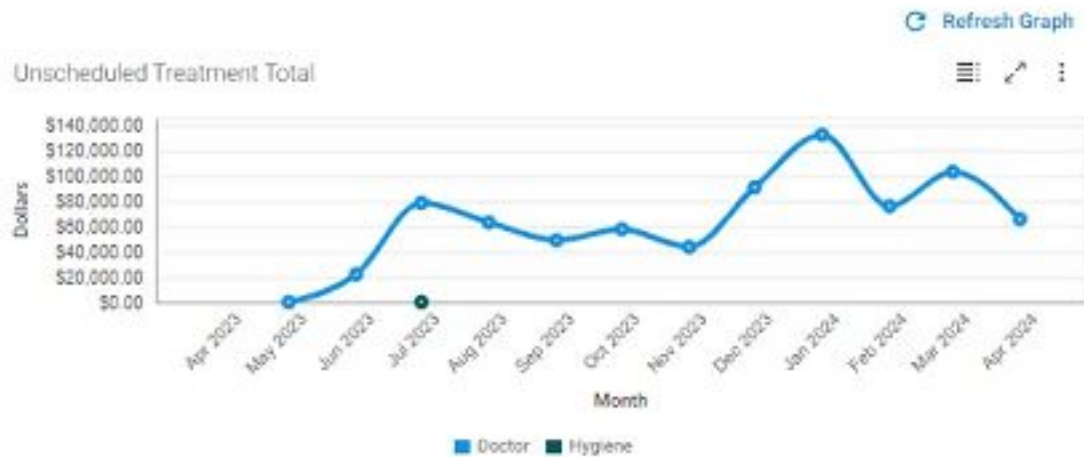
Insights Reports

- Case acceptance rate on track?
 - Any providers falling short?
 - This is also very helpful to track for hygienists and associates alike to spot areas of improvement
 - Startup below is building rapport with patients nicely



Insights Reports

- Unscheduled treatment total on track?
 - Any providers falling short?
 - Can we use the APL to text the patients with unscheduled treatment? Or, better yet, turn on unscheduled treatment reminders so we can be getting patients back in automatically



Huddle Report

- Easily track progress for the day and month-to-date
- Set goals for collection, production, and collection rate



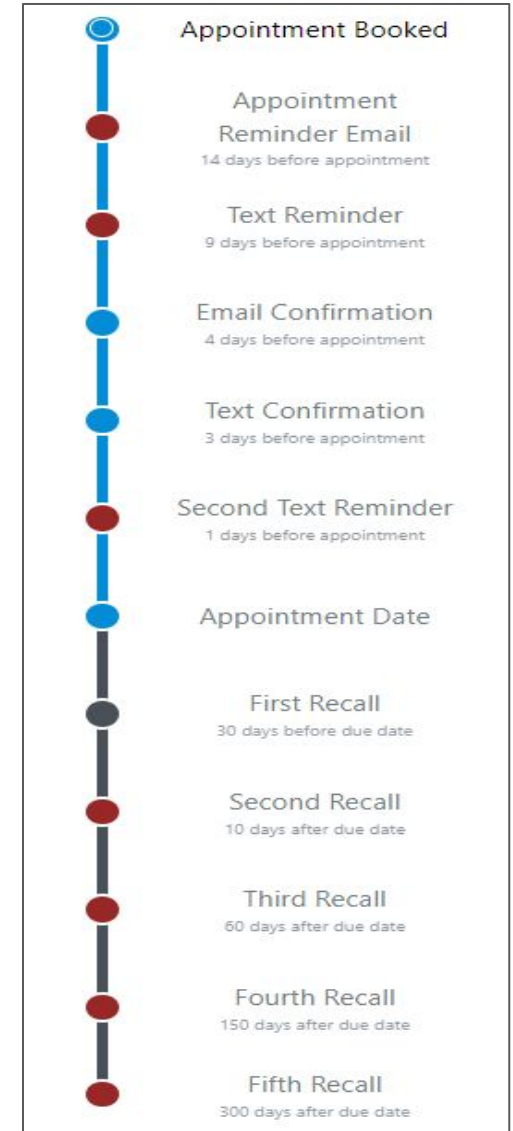
Who is Jennie

- I have been in the dental field for over 25 years. With time in the office and also working for a small Dental Practice Management system training and implementing.
- I have transitioned at Flex from a Trainer to Customer Success Manager
- I spend most days working with practices to determine what their needs are and areas they could be utilizing Flex better in their practice.
- I lived in Wisconsin all of my life until about 1.5 years ago I moved to Florida. I have started a new hobby golf.

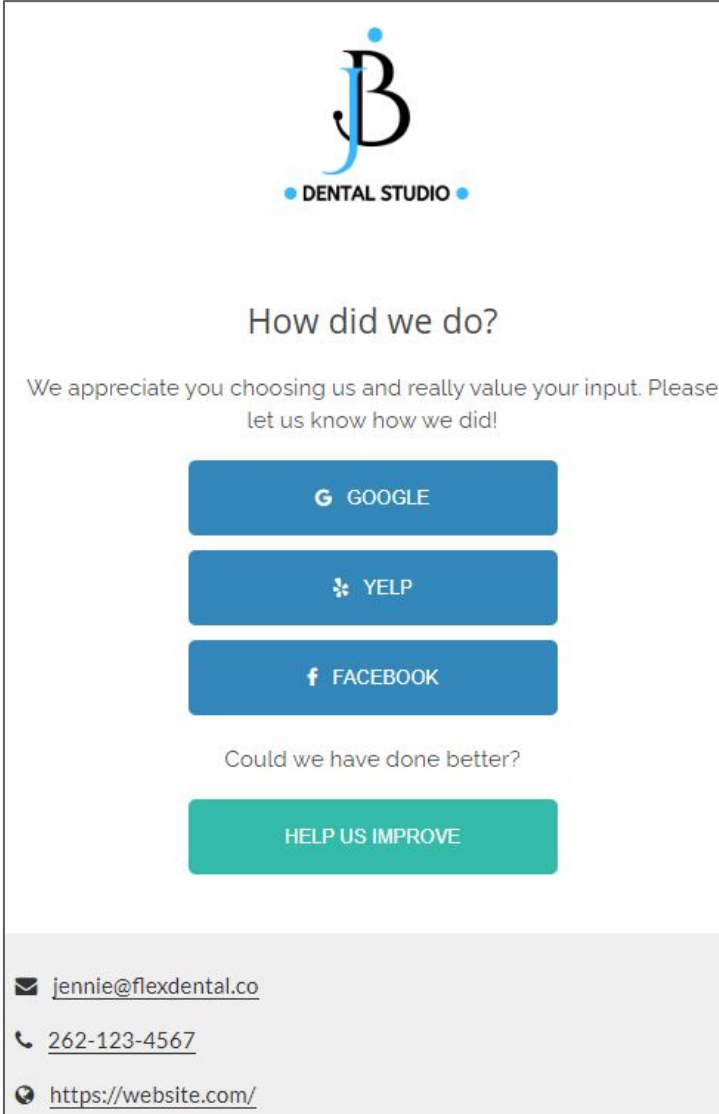


Automation: Communication for confirmations, reminders, and recall messages

- Customized schedule and messages.
- Include Health History paperwork with email confirmations & reminders
- Correspondence records in the patients comm log
- New patients automatically get their new patient paperwork when an appointment is booked in the office or online
- Confirmations write back into open and change the appointment status
- Automatic pre-med messages
- Remind patients with recall messages when they have not scheduled their next cleaning
- Don't forget the automatic Birthday email



Automation: Review Requests



The screenshot shows a review request form for 'DENTAL STUDIO JB'. At the top is the logo, a stylized 'JB' with a blue dot above the 'B'. Below the logo is the text 'DENTAL STUDIO'. The main heading is 'How did we do?'. A sub-heading reads 'We appreciate you choosing us and really value your input. Please let us know how we did!'. There are three blue buttons: 'GOOGLE', 'YELP', and 'FACEBOOK'. Below these is the question 'Could we have done better?' and a green button labeled 'HELP US IMPROVE'. At the bottom, there is a contact information section with an email icon and 'jennie@flexdental.co', a phone icon and '262-123-4567', and a website icon and 'https://website.com/'.

JB
DENTAL STUDIO

How did we do?

We appreciate you choosing us and really value your input. Please let us know how we did!

GOOGLE

YELP

FACEBOOK

Could we have done better?

HELP US IMPROVE

✉ jennie@flexdental.co

☎ [262-123-4567](tel:262-123-4567)

🌐 <https://website.com/>

- Your customized message includes a direct link your practice's Google, Facebook, and/or Yelp pages
- Send review requests via text and/or email automatically after a patient's visit or manually
- Opt patients out from automated reviews



Automation: Unscheduled Treatment Reminders

Unscheduled Treatment

This reminder will notify a patient about unscheduled treatment via text message if they do not have an appointment already scheduled. This is determined by looking at the categories you select for unscheduled treatment reminders and comparing that to code categories on scheduled appointments for the patient. For example, if you choose to send reminders about unscheduled implants, no reminder will be sent if the patient already has an appointment scheduled in one of the 'non-hygiene' categories selected below, but if the patient only has a recall appointment or no appointment at all, they would be eligible. Additionally, we only look at patients that have had an appointment in the last 365 days and are not overdue on recall. You can also use the settings below to exclude specific codes and treatment priorities from being considered.

Send Text Reminder About Unscheduled Treatment



Treatment Categories To Include

Unscheduled reminders will only be sent when patients have treatment that is planned in one of the selected categories

x Fillings x Crown & Bridge

Click here to search

Time of Day To Send Unscheduled Treatment Reminders

00

30

Treatment Priorities To Exclude

You can exclude specific treatment priorities here. For example, if you have fillings set to a priority of 'wait' and 'recommended' and you wish to exclude those from triggering reminders, you would select 'wait' and 'recommended' in the list to your right.

x Wait

Click here to search

Codes To Exclude

Select any codes you may wish to exclude from being considered as 'unscheduled treatment'. Remember that any codes that fall in a category that is not listed as eligible above is automatically excluded.

x D2950 core buildup, including any pins when required

Click here to search

- Treatment can get lost in the office until the patient's next visit
- What determines unscheduled TX. An appointment was completed and qualifying procedure codes have been added to the treatment plan and are no treatment appointment scheduled
- Reminders are sent via text
- Office determines when sent and the frequency



FlexVerification (Insurance Verification)

20- 30 minutes per patient on average it can take from start to finish to reach out to an insurance company to get benefits (via phone or portal), file in Open Dental and update the benefits table.

FlexVerification should save 10-20 minutes per patient per verification for updates.

- Automated checks based on scheduled appointments
- On-demand eligibility when verification needs to happen 'now' when a patient arrives with new insurance
- PDF imports into Open Dental imaging module
- Eligibility and Benefit dates automatically update in Open Dental
- Easily identify in Open Dental and Flex which patients are due for verification or which patient need attention
- Practice controls how often a patient is due for verification and how many days ahead of appointment to automatically verify



FlexVerification (Insurance Verification)

FlexVerification

PDFs from FlexVerification will be saved in the specified OpenDental folder.
 Please note that the content of these PDFs may vary depending on the payer, as they each provide unique information. Consequently, not all PDFs will contain the same level of detail.

Insurance ▼

How often should a patient be due for an insurance verification?

This setting will determine how often a patient's eligibility needs to be ran. This setting will also dictate when to show the eligibility icon on the landing page and in the patient profile. This setting reads and writes to the corresponding setting in Open Dental. Any updates made here will be reflected in Open Dental as well.

1 Months ▼

Insurance Verification On-Demand

With this toggle enabled, users will be able to click the "Verify" button in the patient profile which will prompt Flex to verify the patient's insurance.



Insurance Verification Automation



Automatically verify insurance X days before appointment

The number entered in this field will determine how many days prior to the patient's scheduled appointment Flex will run the insurance verification.

7

Time of day to verify insurance benefits

The time selected in this field will determine the time of day the automated insurance verification will run. Please be aware, if any appointments are added AFTER the scheduled time, they will need to be verified on demand.

08:30 PM ⌚



ALL		DR. BRIAN 1	DR BRIAN 2	DR
Time	Name			
11:00 AM	Jennie Bauer			
02:10 PM	Bob Barker			
Missing email Missing wireless phone				



FlexSchedule

- 60-70% of patients prefer to book online
- 400,000 appointments booked through FlexSchedule in 4 years
- 41% of New Patient appointments have been book outside of working hours
 - Reduce incoming calls
 - Smart scheduling to maximize your schedule (block scheduling, merged ops, flex nudge)
 - Real time integration
 - Customized source links for tracking
 - Include a link in your automated recall messages
 - Customized appointment types such as emergency, consults, NP visits and recall
 - All patient data is collected including any custom questions and transmitted to your appointment book
 - You can require a credit card hold or deposit on selected appointments
 - FlexSchedule is now available in Spanish



FlexSchedule

Your appointment was scheduled!

Emergency

30 minutes



Thursday, May 2 at 10:00 a.m.

at JB Dental Studio

Schedule Another

We're looking forward to meeting you!

Please choose an appointment type.



Emergency
30 minutes



Invisalign Consult
30 minutes



Invisalign Consult
60 minutes



Cleaning & Exam(Age 2-13)
60 minutes



Ortho Test
20 minutes

Welcome!

To book an appointment, first let us know if you've visited before.

New Patient

Returning Patient



JB Dental Studio

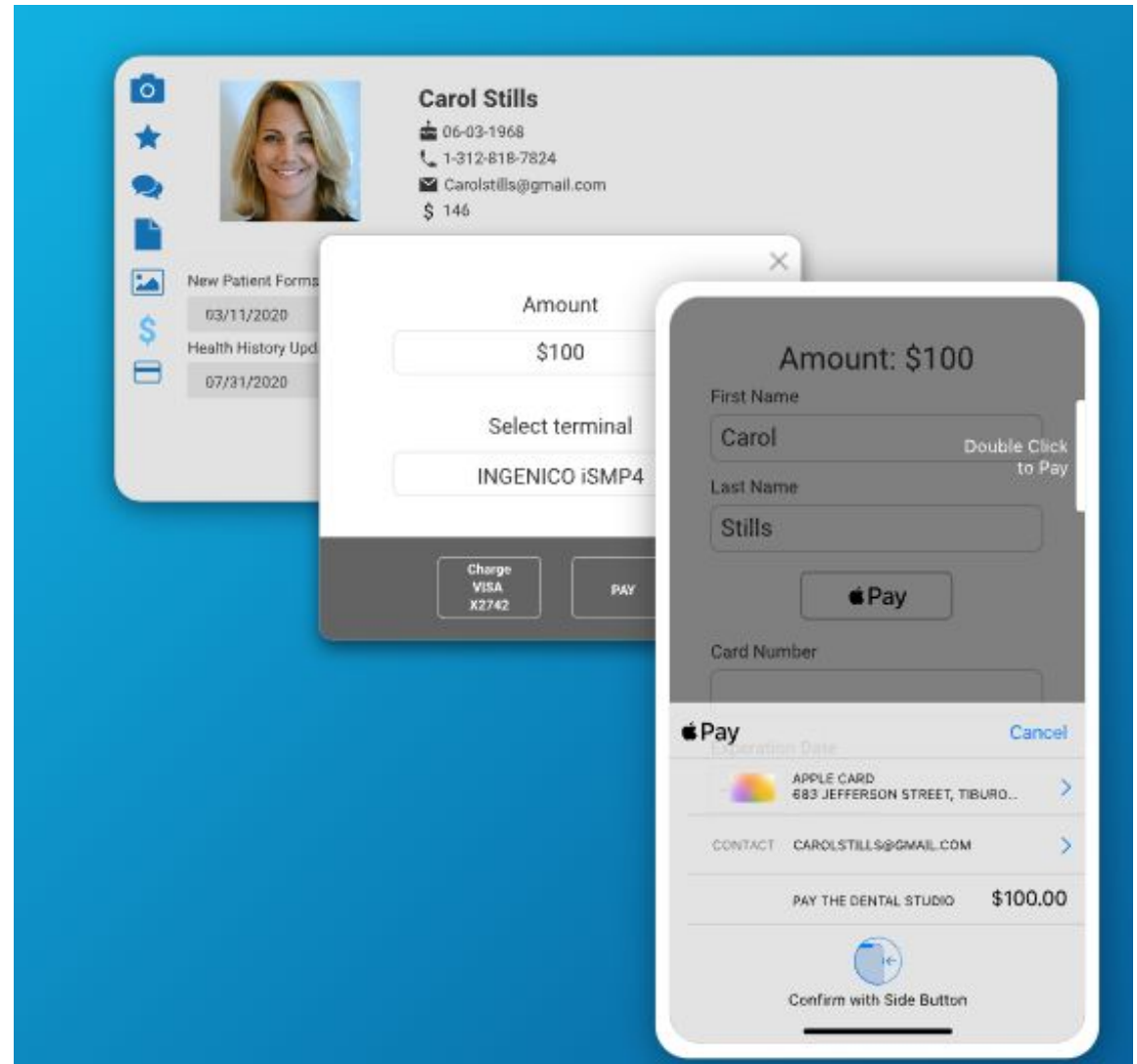
1234 Main Street Eagle, WI 53119

262-123-4567



FlexPay

- Pay in office, directly from a treatment plan, a tablet, or from a patient-specific statement that you can securely text or email — no online portal or special logins required
- Automatically posts to the patient's ledger in Open Dental and allocates
- Send statements in Bulk or on an automated schedule
- Flex can resend statements that are unopened and/or unpaid
- Set Up recurring payments



Flex

DENTAL SOLUTIONS

Questions?



Welcome Practice Leaders!!



Sponsored By



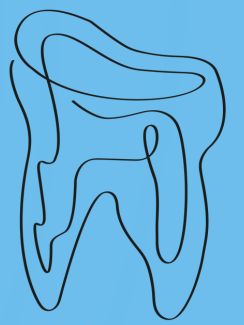
Payment	Adjustment	New Claim	Payment Plan	Instal		
Family Aging	0-30	31-60	61-90	over 90	Total	-InsF
	109.00	0.00	0.00	0.00	109.00	

Patient					
Date	Patient	Prov	Code	Tth	
11/28/2023	Allen	Dr Drexl	T6255	18	Bridge Retainer, P Adj: (\$750.00)
11/28/2023	Allen	Dr Drexl	T6245	19	Bridge Pontic Ins Paid: \$750
11/28/2023	Allen	Dr Drexl	T6255	20	Bridge Retai Pat Paid: \$7 \$10.00, Pat
11/28/2023	Allen	Dr Drexl	Claim		Pri Claim \$ Received 11 Payment: \$7 Writeoff: \$10
11/29/2023	Allen	Dr Drexl	Adjust		Discount Re-do no ch
11/29/2023	Allen	Dr Drexl	Pay		Check \$1,58
11/29/2023	Allen	Dr Drexl	Pay		Credit Card
11/29/2023	Allen	Dr Drexl	InsPay		Insurance P Payment: \$9 Writeoff: \$23
11/29/2023	Allen	Dr Drexl	InsPay		Insurance Payment: \$7 Writeoff: \$10.00
03/08/2024	Allen	Patricia	T9999		- Perio scaling
03/13/2024	Allen	Dr Drexl	Txfr		

Communication					
Date	Time	Name	Type	Mode	
11/28/2023	1:44p		ApptRelated		Appt BR for #1 11:00:00 Do not wait for resched Deleted Appointment & RelPFM: Patient has
12/15/2023	12:27p	Candi	Insurance	Phone	HI THIS IS A NOTE
01/16/2024	3:44p		Recall	Phone	Patient Will Call Us
03/08/2024			Recall	Phone	tiha,flnvas,obnawr,ioj nav

From Stress to Success:

TRANSFORMING YOUR PRACTICE WITH OPEN DENTAL



SKF

PRACTICE SOLUTIONS



STRESS TO SUCCESS WHO ARE WE

At SKF Practice Solutions, our driving force is a set of core values: knowledge, integrity, efficiency, accuracy, and gratitude. Our mission is clear—to alleviate team burnout in dental offices across the country. We achieve this by offering comprehensive training and implementing tailored systems and processes that enhance efficiency and effectiveness.

The United States needs at least 150,000 new dental workers to support the dental industry. (Today'sRDH)

Around 90 percent of dentists who are hiring are finding it difficult to recruit. (American Dental Hygienists Association)

Introducing smarter and more efficient practice systems can boost productivity by 18 percent. (Dental Economics)



burn·out

/'bɜːn, out/

noun

physical or mental collapse caused by overwork or stress.

"high levels of professionalism that may result in
burnout"

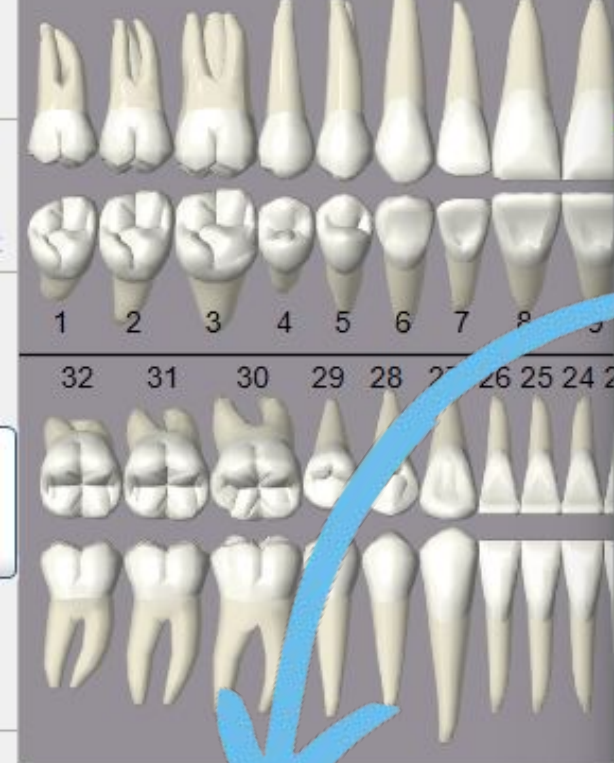






Morning Huddle Sheet

- Today's Production and Collections: \$_____ / \$_____
 - Opportunities for Same Day Treatment:
 - Name and Plan: _____
 - Name and Plan: _____
 - Name and Plan: _____
- Patients that have special items to discuss:
 - Name and Item: _____
 - Name and Item: _____
- Patient Balances to Discuss:
 - Name and Plan: _____
 - Name and Plan: _____
- Night follow-up
 - Employee/ Issue: _____
 - Employee/ Issue: _____
 - Employee/ Issue: _____
- Handoffs
 - Do we need improvement or were they successful yesterday?
 - Employee/ Issue: _____
 - Employee/ Issue: _____
- Production- Where are we?? Have Julie mark the board (Make sure she marks the board)
- Reviews- How many? Any people by name?
- Anything else that we need to discuss? (Implants, lab cases in, announcements, meetings, etc.)



Medical Urgent
Medical Summary

Abbr	Note
2PEN	Patient Music/TV Preferences:Essential Oil Scent:Prophy Paste Flavor:Personal Note:

Edit Quick Paste Note

Abbreviation

PEN

If you type a ? immediately followed by the abbreviation, your note will be inserted

Note

Patient Music/TV Preferences:
Essential Oil Scent:
Prophy Paste Flavor:
Personal Note:

04/23/2024

Patient Music/TV Preferences: Taylor Swift
Essential Oil Scent: Citrus
Prophy Paste Flavor: Citrus
Personal Note: Has a dog named clementine

Patient I

Allergies	none
Med Urgent	
Medical Summary	
Medications	none
Problems	none
Age	
ABC0	
Billing Type	Standard
Referred From	??





Art © by Lynn Sweet

1. Change The Towels

2. Dust Furniture

3. Draw the blinds

4. Dress The Chicken

Change The Towels:

- Remove used towels from bathrooms and bedrooms.
- Replace with fresh towels from the linen closet.
- Neatly stack used towels for laundry.

Dust Furniture:

- Gather a clean, dry cloth and furniture polish.
- Starting from the top, dust surfaces such as tables, shelves, and cabinets.
- Use gentle, circular motions to remove dust and polish wood surfaces for a shiny finish.

1. Handle appointments.

2. Manage inventory.

3. Communicate with staff.

4. Complete administrative tasks.

-John

Handle Appointments

Check the daily appointment schedule to

identify any cancellations or rescheduling

requests.

Contact patients with upcoming appts to

confirm their attendance and remind them of

any necessary pre-appointment instructions.

Use the office's scheduling software to adjust

the appointment schedule as needed, ensuring

optimal time management and patient flow.

-Aimee





[Slido](#)







Betty

B/F V
 M O/I D
 L

Entry Status
 TreatPlan
 Complete
 ExstCurPro
 ExstOther
 Referred
 Condition

Today
 04/23/2024

None
 Caries
 Recurrent (Car)
 Incipient (Car)
 Defect (or miss)
 Missing (tooth)
 Irrevers. Pulp.
 Revers. Pulp.
 Necrotic
 Anical Perio

Prognosis
 no prognosis ▼

Priority
 no priority ▼

Procedure Buttons:
 Quick Buttons
 General
 Exams/Cleanings/Xray

Treatment Plans

Or Single Click:

Default View

Date	Th	Surf	Dx	Description	Sta	Prov	Amount	ADA Code	User	Signed
04/23/2024				New Patient Concierge Call	C	DOC	0.00	NPC	Admin	
<p> Caller's Name: Betty Reason for Call: NP Concierge Call </p> <p> Notes: Called to inquire about the patient's experience during their recent visit to our office. Asked about any concerns or feedback the patient may have regarding their appointment. Listened attentively to the patient's comments and ensured their feedback was noted for further consideration. </p> <p> Patient Stated: They were happy with the office, but was a bit cold </p> <p> Will relay the patient's feedback to the appropriate staff members for review and consideration. </p> <p> Will follow up with the patient in 6 months to ensure their concerns have been addressed satisfactorily. </p>										

Augusta



Filters

Days Old Date Range Date Range Applies To Treat Provs Last Custom Tracking Status

Days Old (min) (leave both blank to show all) Preauth Options Clinics Carrier

(max) Ignore Custom Tracking For User Last Error Definition

Claims												
Carrier	Phone	Type	User	PatName	Clinic	DateService	DateSent	DateSentOrig	TrackStat	DateStat	Error	Amount
Azure Insurance		Pri		Damian, Cleo	North	07/12/2022	07/12/2022	09/08/2022	-	01/01/0001	-	110.00
Azure Insurance		Other		Blum, Maxwell	East	08/09/2022	08/10/2022	09/02/2022	Missing Information	09/16/2022	E1	960.00
Delta Dental		Pri		Cambria, Elliot	North	09/26/2021	09/26/2021	06/27/2022	-	01/01/0001	-	158.00
MedDent Insurance Co.	(800)555-6548	Preauth		Blum, Maxwell	North	01/01/0001	06/29/2022	06/29/2022	-	01/01/0001	-	960.00
MedDent Insurance Co.	(800)555-6548	Pri		Blum, Maxwell	East	08/09/2022	08/10/2022	09/02/2022	-	01/01/0001	-	960.00
MedDent Insurance Co.		Pri		Sellers, Laurel	East	08/09/2022	08/09/2022	08/31/2022	-	01/01/0001	-	236.00

Carrier/Plan Info

Carrier:

Carrier Phone:

Group Number:

Group Name:

Patient/Subscriber Info

Patient DOB:

Subscriber Name:

Subscriber DOB:

Subscriber ID:

Custom Tracking

Clicking Update will change the status of all of the claims in the grid.

6 claims

Total





Hello, Raphael!
Welcome to your appointment with Micah Ruiz and George Davidson.



Registration Form (Mobile)



HIPAA



Medical History Update



Financial Agreement





One trigger event will cause one action to be taken

Automation			
Description	Trigger	Action	Details
Lab Case	ScheduleProcedure	PopUp	
Initial/Replacement	T6531	PopUp	



Auto Note Edit

Name

Text

REASON FOR CROWN:
PREP DATE:
SEAT DATE:
% OF MISSING TOOTH STRUCTURE:
I/O PHOTO TAKEN:



Or

Procedure Buttons:

- Quick Buttons
- General
- Exams/Cleanings/Xray
- Crowns & Bridges**

Or Single Click:

Crown+CBU+Insert+BWX+IO

Diagnosis

Entry Status
 TreatPlan
 Complete
 ExstCurPro
 ExstOther
 Referred
 Condition

Today
 04/23/2024

Prognosis
 no prognosis v

Priority
 no priority v

Treatment Plans

Treatment Plans			<input type="button" value="+ New TP"/>
Status	Heading	Procs	
Active	Active Treatment Plan	5	

Procedures					Set Priority
Priority	Tth	Surf	Code	Description	No Priority
1			IO	IO Photos	1
				Photo	2
1	18		T2345	Build Up	3
2	18		T6531	PFM Crown	4
3			SEAT	SEAT	5
3			BWX	Single BWX	6

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- Next
- Low
- Recmend
- Wait

Automations

Recall Texts

Quick Procs

Tasking

Self Check In

Verifications

Premed Reminders

Review Requests

Web Scheduling

Explosion Codes

Confirmations

ASAP List

Recall Types

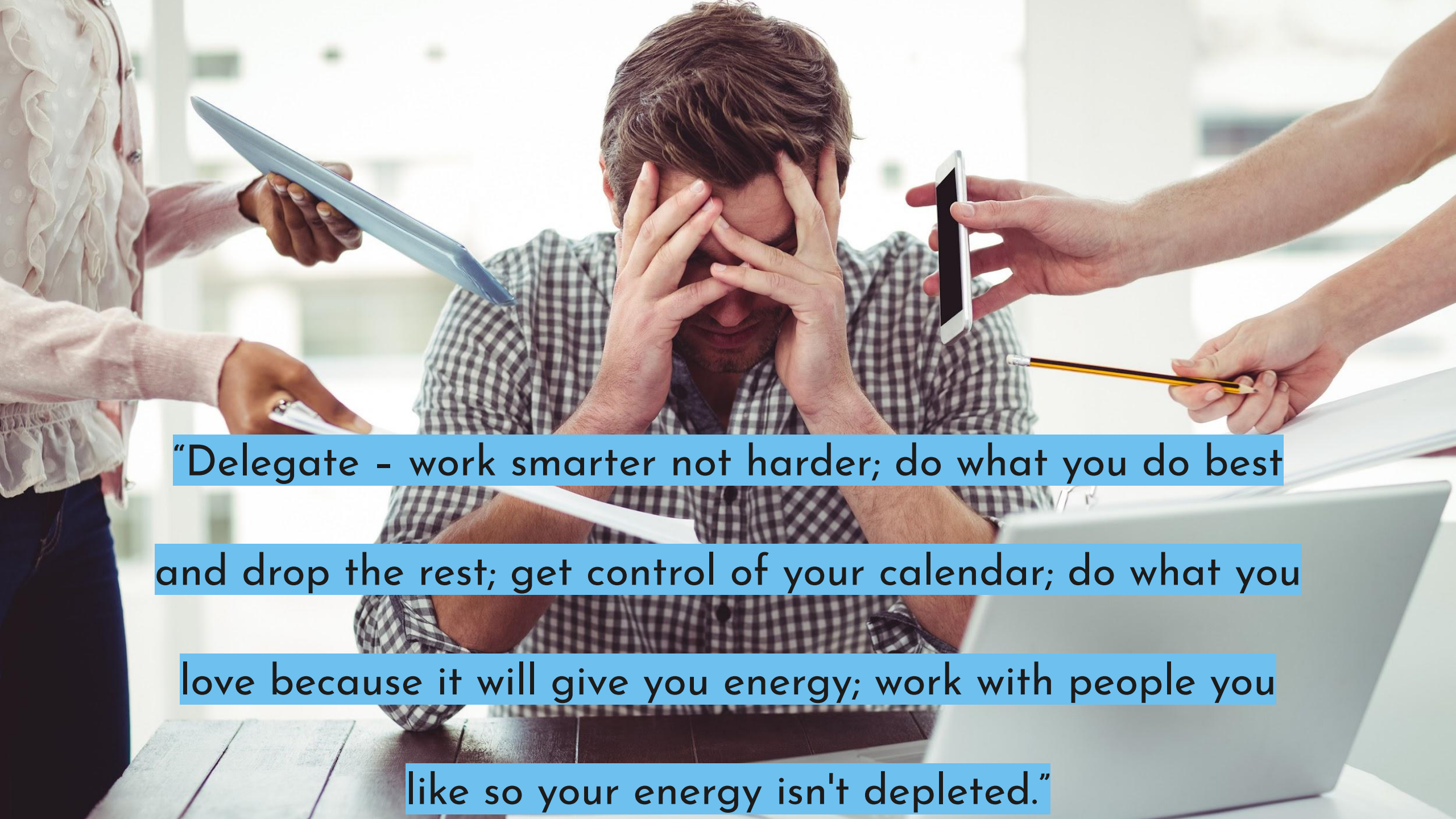
Membership

Plans

Patient Forms

Recall Texts



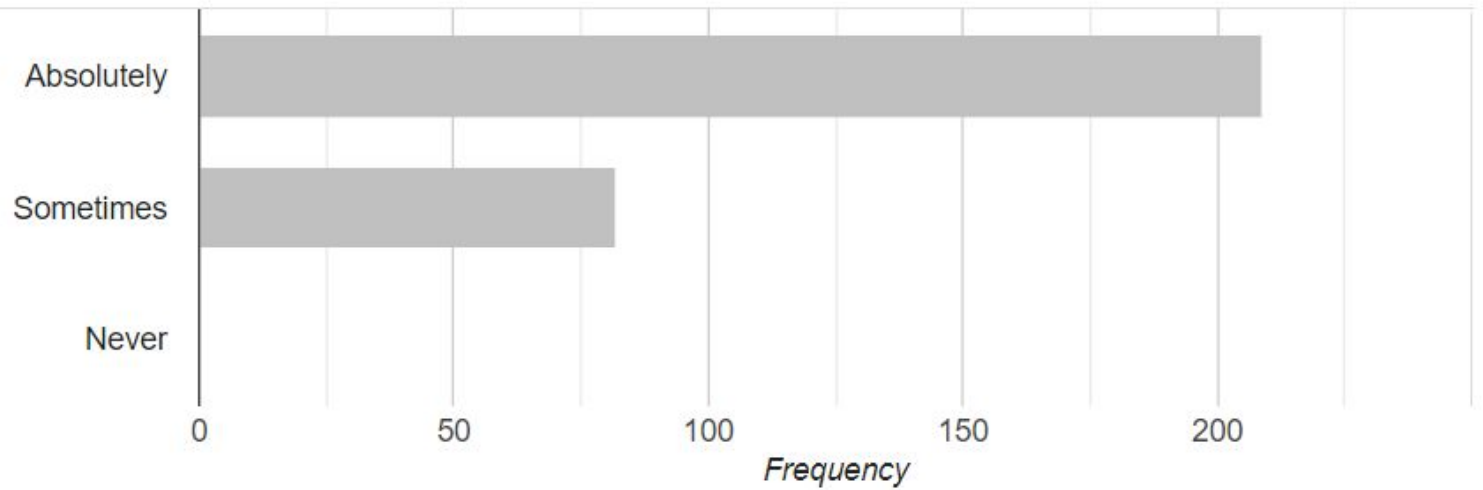


“Delegate - work smarter not harder; do what you do best and drop the rest; get control of your calendar; do what you love because it will give you energy; work with people you like so your energy isn't depleted.”



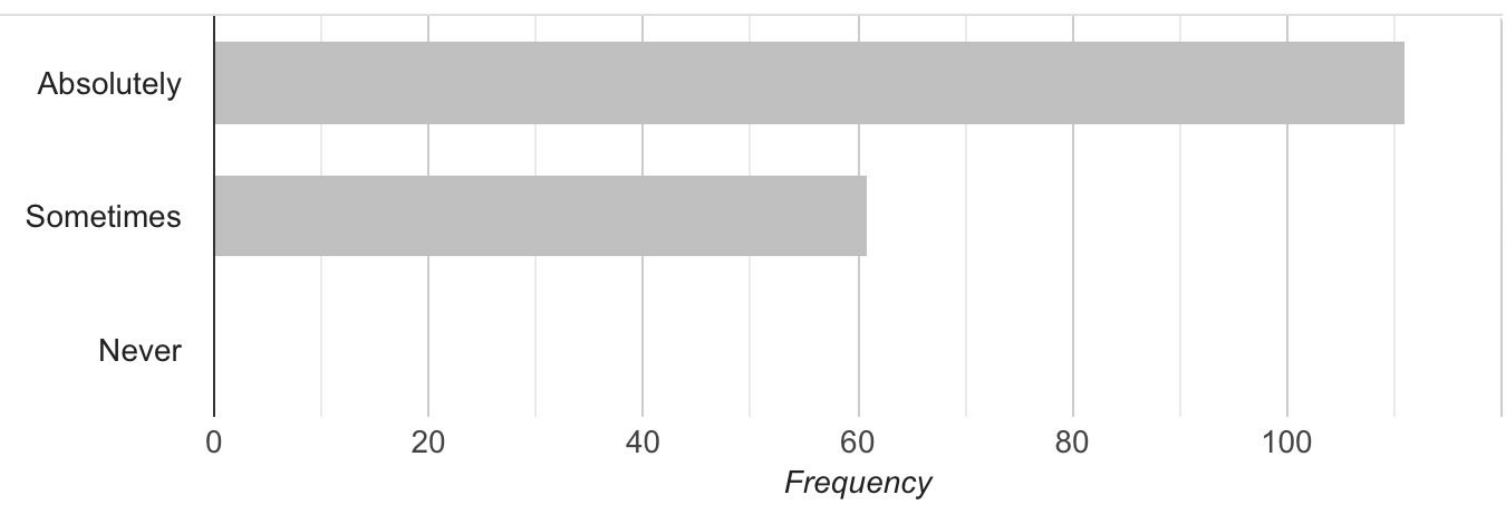
Your Executive Presence

The leaders in my practice actively listen and try to understand my perspective and needs.



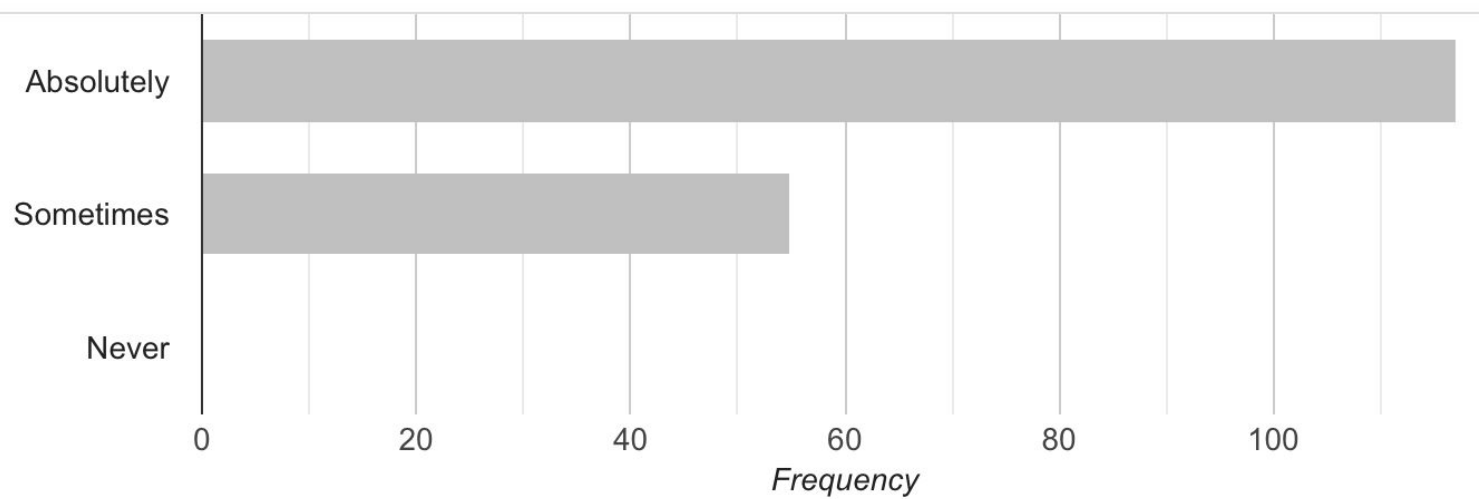
Your Executive Presence

Leaders in my practice take ownership of their mistakes.



Your Executive Presence

Leaders in my practice strive to create a supportive and healthy work environment where I feel empowered, safe and valued.



Your Executive Presence

Leaders in my practice genuinely believe in teamwork and collaboration.

Absolutely

Sometimes

Never

0

20

40

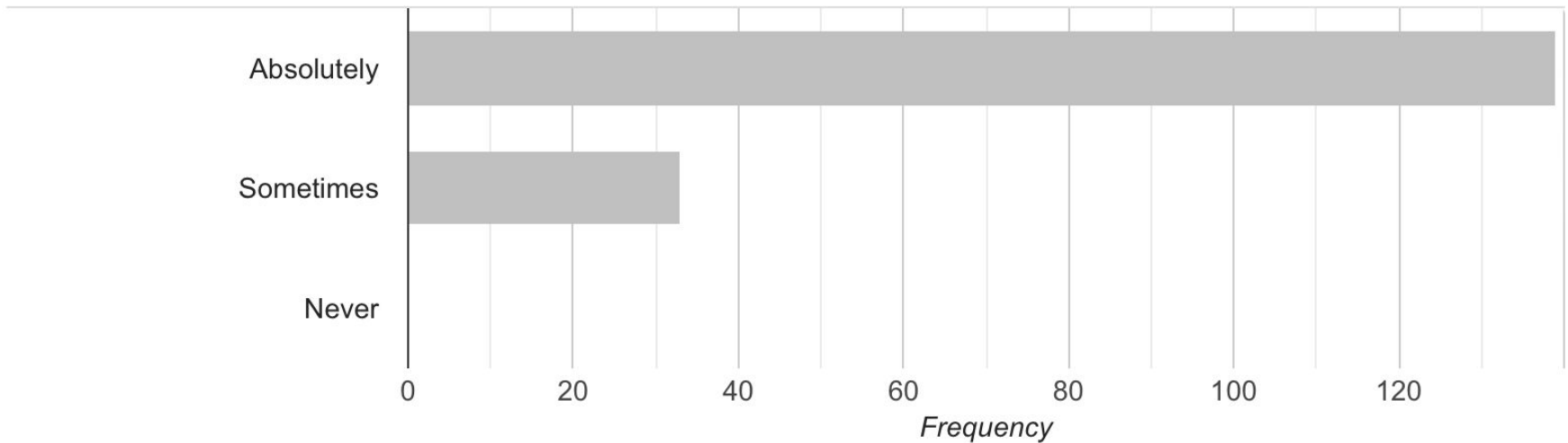
60

80

100

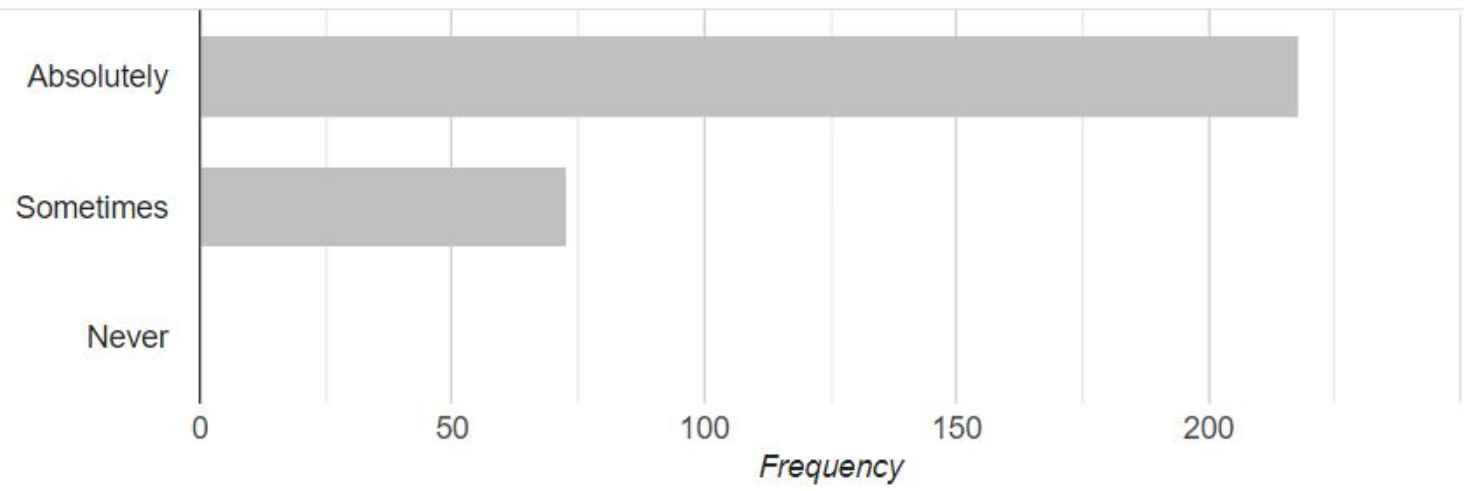
120

Frequency



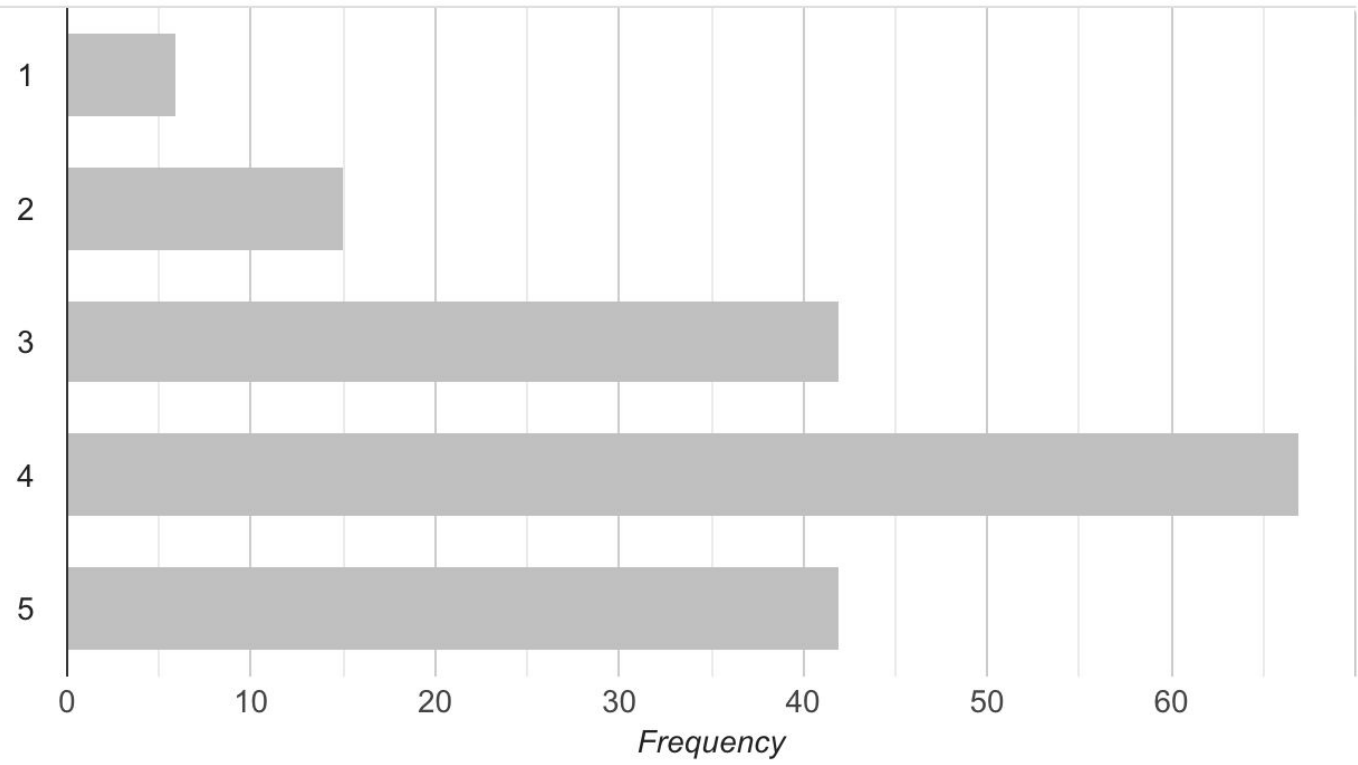
Your Executive Presence

Leaders in my practice invest in my professional growth, allowing me to meet my full potential.



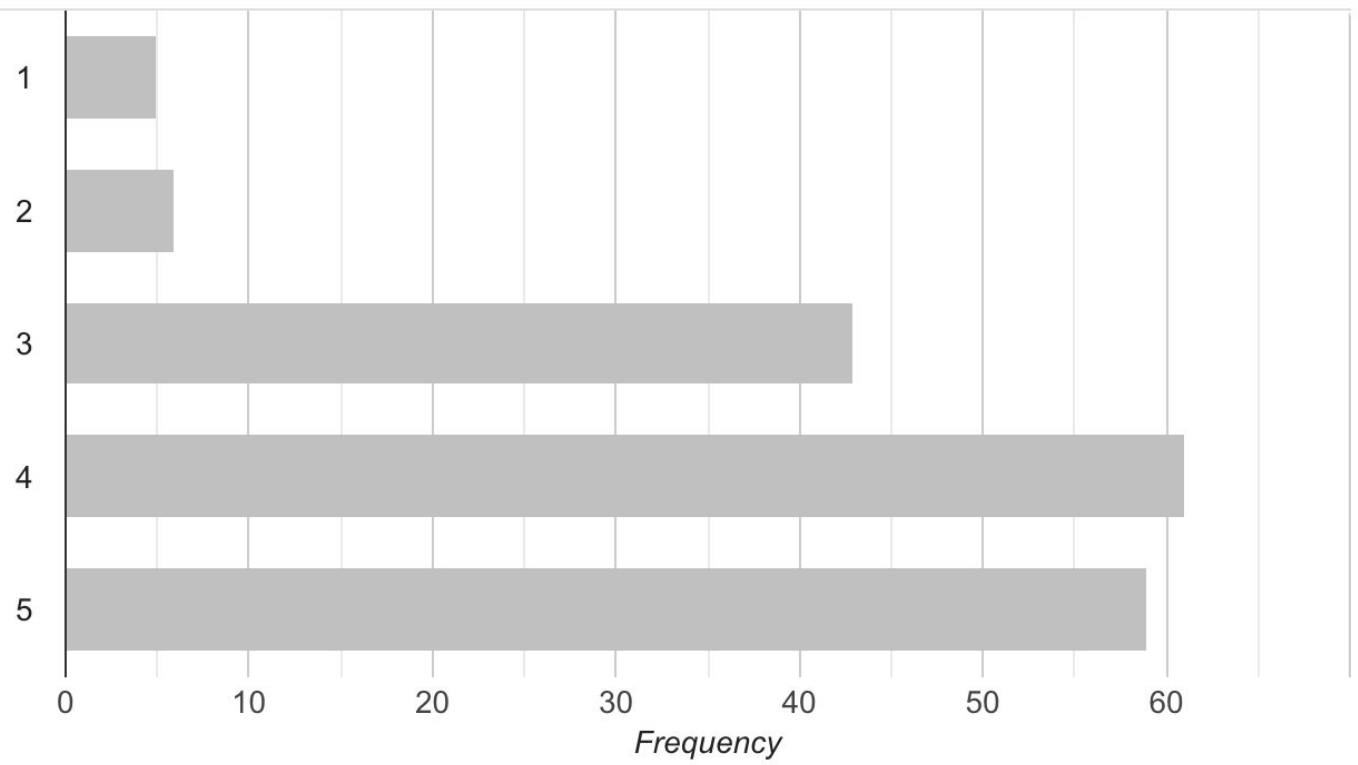
Your Executive Presence

How would you rate communication from leaders in your practice?



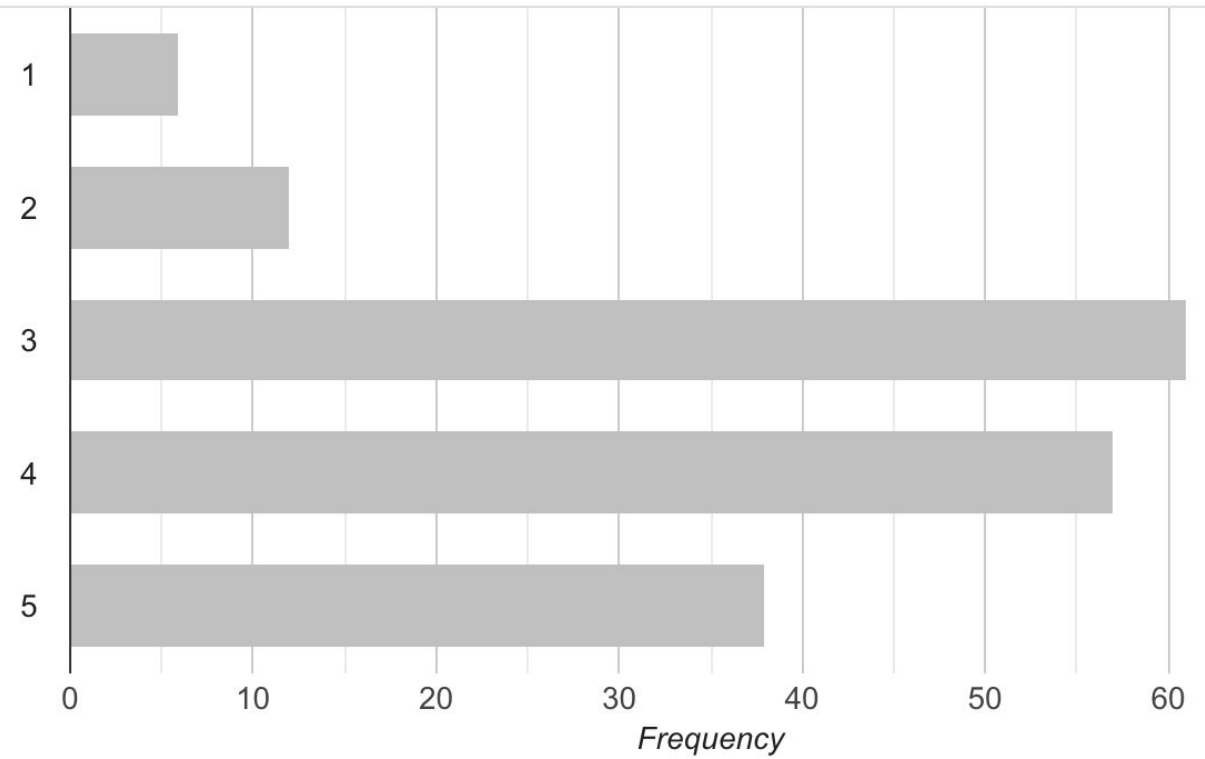
Your Executive Presence

How would you rate your team culture?



Your Executive Presence

How would you rate your office systems and processes?





Your Executive Presence

I have only been here since the end of December, and since day one it has been chaotic. Let me begin by saying the reason I took this job is because I believed in the company's mission statement. I love the company's value system and believe in their overall vision. The core ownership and top level leaders in the company (that I have met and worked with) are phenomenal and they have supported me in my training and helped me to strengthen my understanding of the business structure. However, there has been a constant state of chaos within our office, that has yet to be resolved. There needs to be a clear definition of responsibilities, ownership of roles as they pertain to the office, and a focus on addressing the immediate needs of accounts and processes. Currently, I feel as though we are treading water to try and stay afloat. I would prefer a situation where the focus was put upon those items that are most important to "right the ship," and then we can address the bigger picture. Attention is the one thing I would change. Attention to our accounts, roles, leadership, management and "righting the ship" so that we can sail onward to a successful future!! :)

What would change?

- Better systems. More attention to the details
- Continuity
- Better communication between all of the team members.
- Better listening to understand on both ends.
- I would like more transparency with what is happening in the future because everyone feels like their job is in jeopardy. I do not want to discuss items that do not fall under my job description/title. The office as a whole has seen many a manager come and go; we function on our own without the proper support from higher ups but are always reprimanded for shortcomings out of our control due to improper support. I can say, the only thing consistent with this job/company is inconsistency and never-ending changes.



What to You Love?

- Juliette is fantastic to work with. I can tell her heart is in creating a great environment for taking care of the team and the patients.
- Work environment.
- I love working with patients and watching them take ownership of their oral health. I feel successful when I can help to put all of the pieces in to place to help patients complete treatment. Most importantly, however, I thrive on being a part of team that works together seamlessly to achieve a mutual goal. That is the most satisfying aspect of my position. Knowing that we can all rely on each other with confidence and trust to complete the ultimate goal.
- I enjoy learning new things. In my position, there's always trainings to be done. But I do like the patient/parent portion of a day.

Building The Ideal Triade

Humble

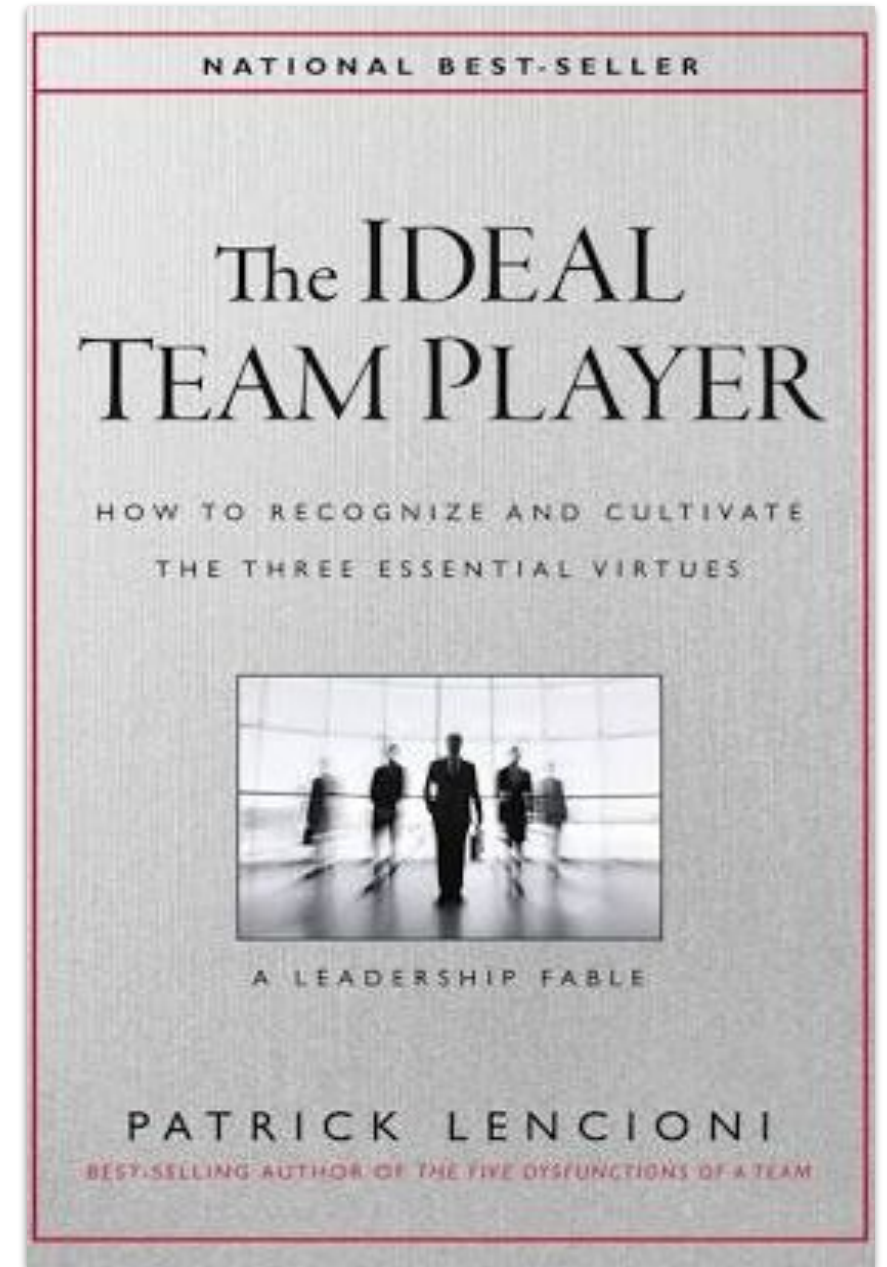
- Lack excessive ego
- Share credit

Hungry

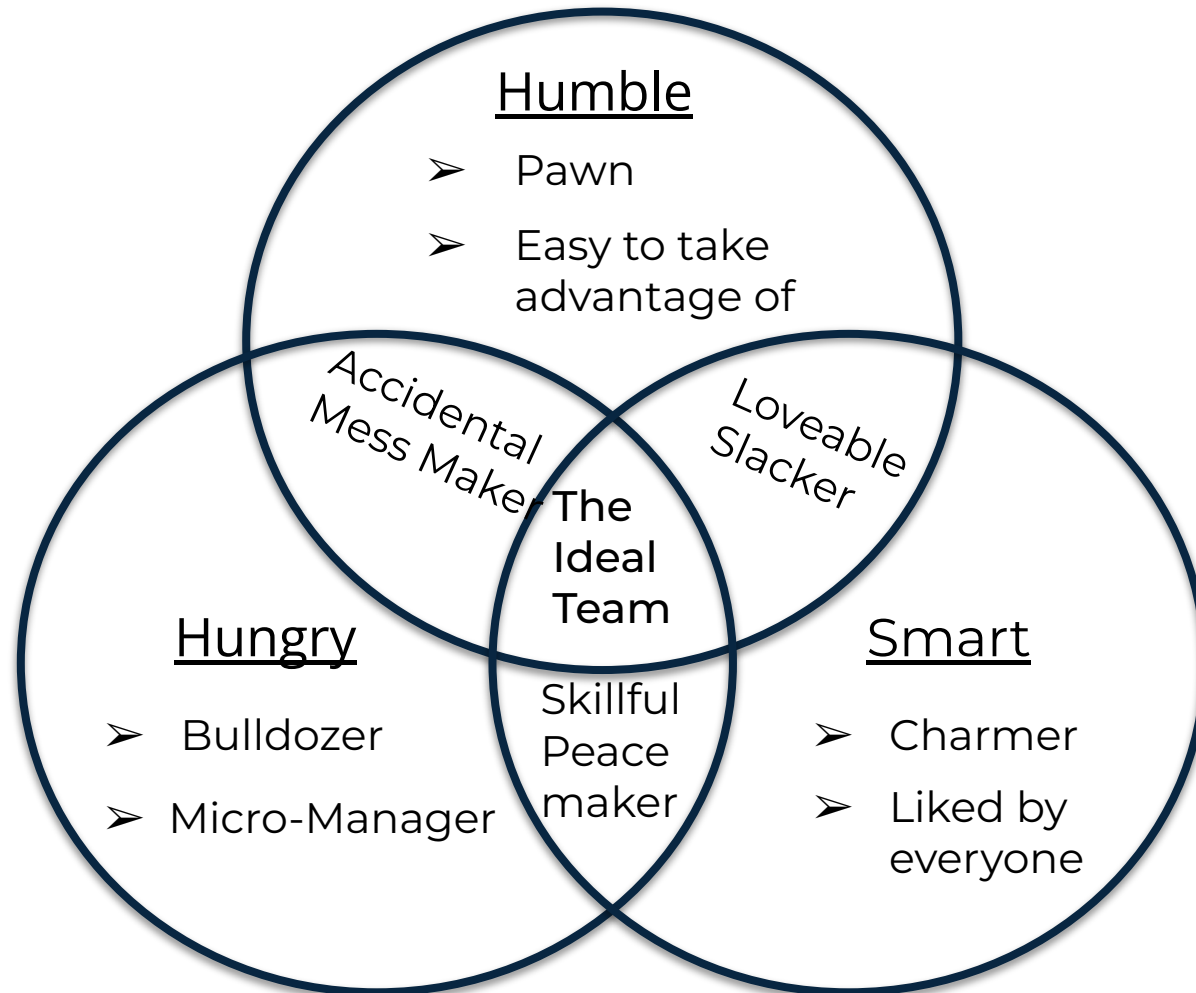
- Self-motivated
- Deligent Always looking for more

Smart

- People common sense
- Emotional intelligence



Building The Ideal Team



The Ideal Team Player Self Assessment

Instructions:

Use the scale below to indicate how each statement applies to your actions on the team.
Respond as honestly as possible, as this will allow you to most accurately identify any areas of development that you may have.

Scale:

3 = Usually 2 = Sometimes 1 = Rarely

Humble

My teammates would say:

- _____ 1. I compliment or praise them without hesitation.
- _____ 2. I easily admit to my mistakes.
- _____ 3. I am willing to take on lower-level work for the good of the team.
- _____ 4. I gladly share credit for team accomplishments.
- _____ 5. I readily acknowledge my weaknesses.
- _____ 6. I offer and accept apologies graciously.

_____ **Total Humility Score**

Hungry

My teammates would say:

- _____ 7. I do more than what is required in my own job.
- _____ 8. I have a passion for the "mission" of the team.
- _____ 9. I feel a sense of personal responsibility for the overall success of the team.
- _____ 10. I am willing to contribute to and think about work outside of office hours.
- _____ 11. I am willing to take on tedious or challenging tasks whenever necessary.
- _____ 12. I look for opportunities to contribute outside of my area of responsibility.

_____ **Total Hunger Score**

Smart

My teammates would say:

- _____ 13. I generally understand what others are feeling during meetings and conversations.
- _____ 14. I show empathy to others on the team.
- _____ 15. I demonstrate an interest in the lives of my teammates.
- _____ 16. I am an attentive listener.
- _____ 17. I am aware of how my words and actions impact others on the team.
- _____ 18. I adjust my behavior and style to fit the nature of a conversation or relationship.

_____ **Total Smart Score**

Self Assessment

- The purpose of this assessment is to help develop team culture throughout the organization.

- This also helps you and your teammates understand how we all embody the three virtues of an ideal team player

How do you
find the ideal
tribe
member?



Mission Statement

A **mission statement** is a concise declaration of the core purpose and focus of a dental office, serving as a guide for all decision-making within the organization.

It helps the office focus on what is important: taking good care of patients and making sure everything runs smoothly. It's like a daily plan that reminds the team how to work together and what goals they should work towards.

Mission:

Our mission is to be the most community-oriented dental practice in the state. We will accomplish this through radical generosity and by building our foundation on a patient base we call family.

Vision:

Our vision is to have expertly trained doctors, a close-knit staff, and a growing business that supports all it's employees at 3-4 locations.

Core Values:

- Fantastic guest experience
- Always be improving
- Hungry & Humbly confident
- Have each other's backs

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- Hungry & Humbly confident
- Have each other's backs

Vision Statement

A vision statement outlines the long-term aspirations of the dental office. It's a source of inspiration and a beacon for where the organization is headed in the future.

It's like a dream for the future of the dental office. It shows what the office wants to become, like being the best dental office in the area known for great care and happy patients. It's meant to inspire everyone to work hard and aim high, thinking about the big picture of what they can achieve together.

Core Values

Core values are like the main rules that everyone in the dental office agrees to follow. They tell us how to act at work and help us make decisions that are good for our patients and our team.

- **Self-Awareness**
- **Personal Integrity**
- **Grit**
- **Open and Honest Communication**

CORE VALUES CREATION EXERCISE

(Inspired by Gino Wickman-Traction)

STEP 1: Envision your "Dream Team"

This is preferably an existing team member, but if necessary it can be a past team member, a colleague's team member or a composite of your version of the perfect employee per position.

STEP 2: List out the characteristics and traits that the "Dream Team" embodies.

Office Manager

Associate Dr.

Hygienist

Front Office

Back Office

Treatment Coordinator

Other Positions

STEP 3: Circle the traits above that really resonate with you and are highest priority. Draw a line through the ones that are not.

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STEP 4: Reduce the list to a maximum of seven core values. List them here.

1.

2.

3.

4.

5.

6.

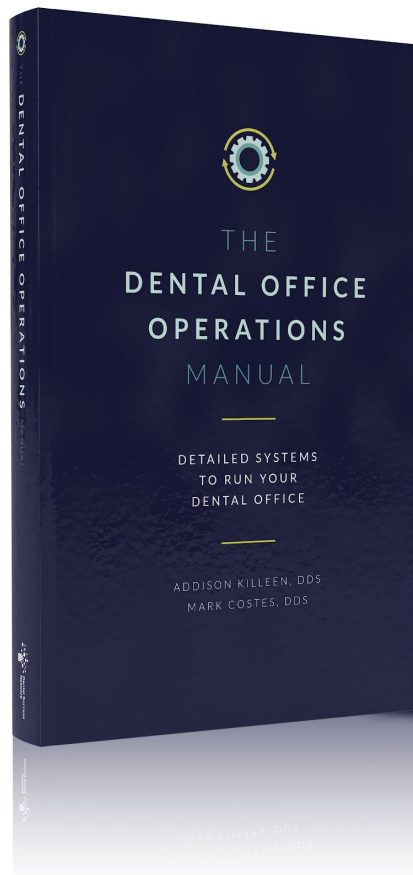
7.

STEP 5: Integrate core values into a sentence: "We strive to..." "We always..."
List them on the Foundations/Growth Worksheet and Team Cultural Assessment

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Clear Job Descriptions



- **Enhances Hiring:** It attracts the right candidates who fit the job's requirements, making the hiring process more effective.
- **Clarifies Expectations:** It tells team member exactly what their responsibilities are, helping prevent misunderstandings.
- **Builds Confidence and increase Job Knowledge:** It allows team members to take calculated risk limiting consistent reminders and improving operational workflows.

Leadership Skills To Make This All Possible

- Mastering the art of servant leadership and what it means to have a leadership presence in your practice.
 - Humble, Hungry, Smart
- Intentional Goal Setting
 - Aim, Attitude, Attention, Assumption
- Build Rapport
 - Make an effort to understand your team and each of their perspectives, feelings and motivations. This will help create a sense of empathy and connection.
- Recognitions and Rewards
 - Celebrate team members who take the initiative
- Feedback Loop
 - Giving team members the opportunity to share ideas and insights on processes and improvements. Create action items, set due dates and





Sydney Robinson

sydney@dentalsuccessnetwork.com

817-823-2655

KPIs Simplified: They're Just Numbers, Not Nightmares!

 FOA COACHING
By Front Office Academy

 **FrontOfficeAcademy**
By **Dental Success Network**

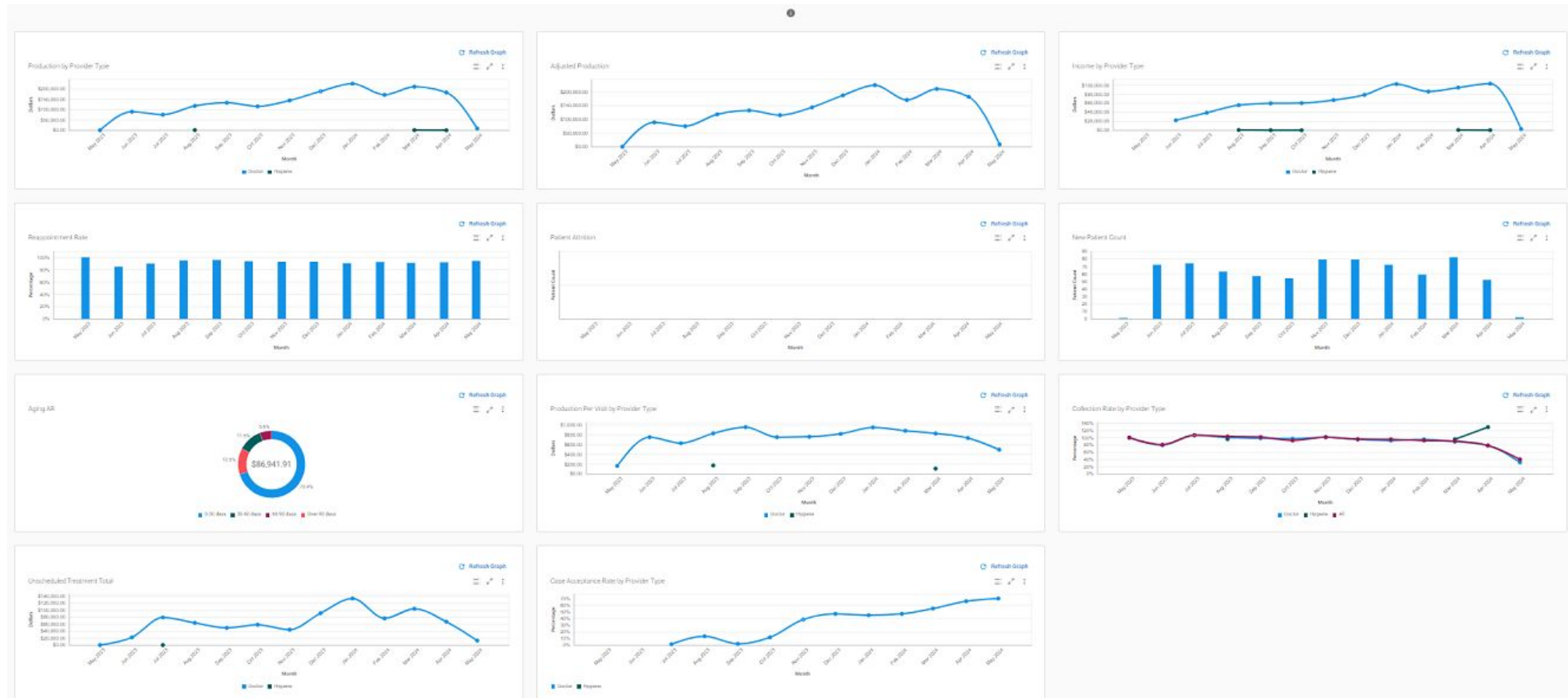


Understanding KPIs

KPI's: Key Performance Indicators


- Production
- Collection
- Case Acceptance
- # Of Missed Calls
- Reappoint
- Recall
- Hygiene Production
- Accounts receivable

Understanding KPIs



- ChatGPT
- DALL-E
- Explore GPTs
- Today
- MySQL
- Previous 30 Days
- Pivot to Purpose
- Catchy Dental Newsletter Subject
- Dental Podcast: Underused Open
- Open Dental Licensing Summary
- MySQL Query: Active Patients
- Spouse Work Tips Dental
- Blog Posts
- Adding Provider in Open Dental
- April
- Conversion Support Agreement R
- Lowest Fee Schedules Analysis
- Add Team workspace
Collaborate on a Team plan
- Brittany Rogars

ChatGPT 3.5





How can I help you today?

Explain nostalgia
to a kindergartener

Help me study
vocabulary for an exam

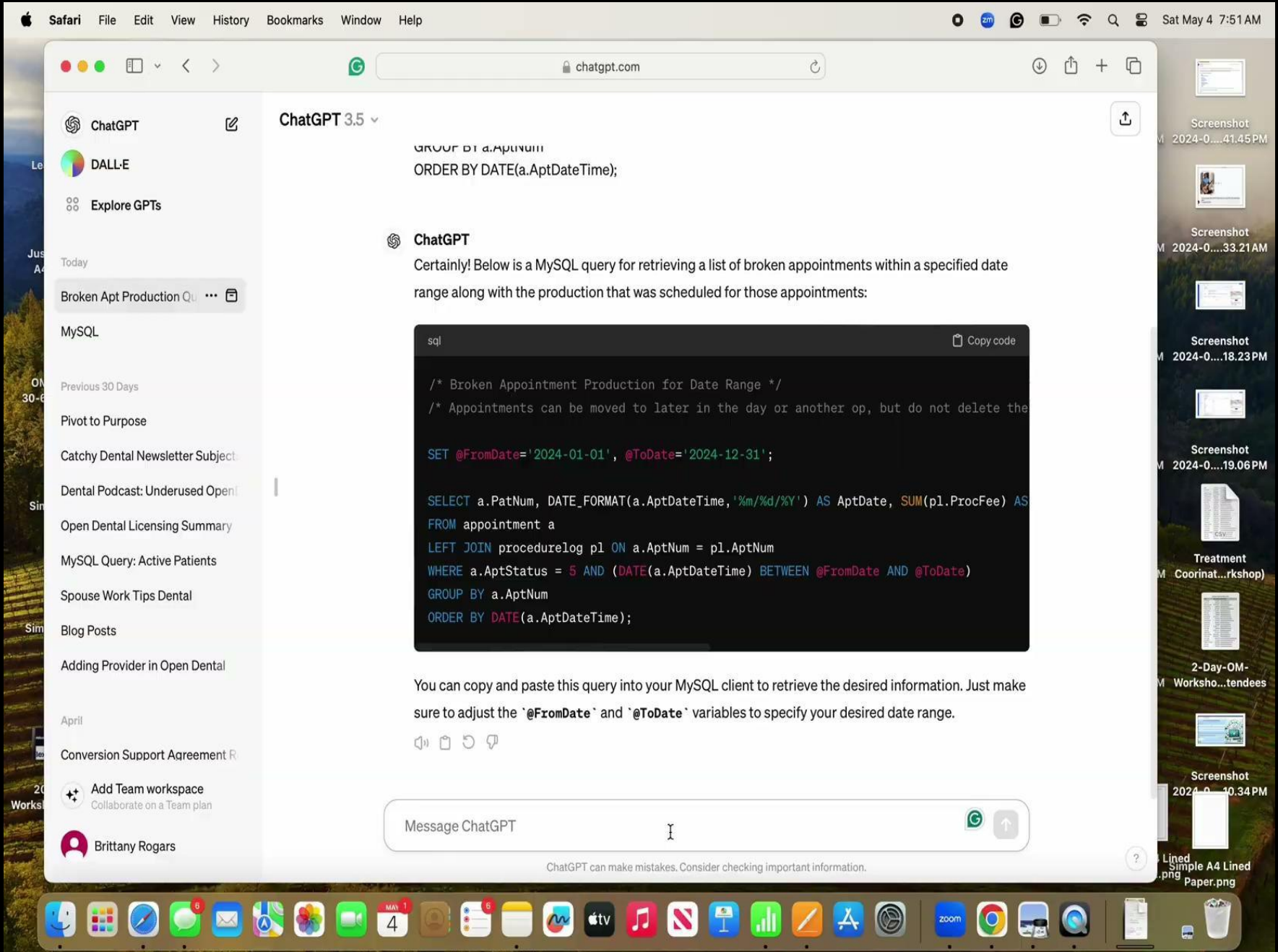
Write a Python script
to automate sending daily email reports

Create a workout plan
for resistance training

ChatGPT can make mistakes. Consider checking important information.

- Screenshot 2024-0...41.45 PM
- Screenshot 2024-0...33.21 AM
- Screenshot 2024-0...18.23 PM
- Screenshot 2024-0...19.06 PM
- Treatment Coordinat...rkshop)
- 2-Day-OM-Worksho...tendees
- Screenshot 2024-0...10.34 PM
- Lined Simple A4 Lined Paper.png



GROUP BY a.AptNum
ORDER BY DATE(a.AptDateTime);

ChatGPT
Certainly! Below is a MySQL query for retrieving a list of broken appointments within a specified date range along with the production that was scheduled for those appointments:

```
sql Copy code  
  
/* Broken Appointment Production for Date Range */  
/* Appointments can be moved to later in the day or another op, but do not delete the  
  
SET @FromDate='2024-01-01', @ToDate='2024-12-31';  
  
SELECT a.PatNum, DATE_FORMAT(a.AptDateTime, '%m/%d/%Y') AS AptDate, SUM(p1.ProcFee) AS  
FROM appointment a  
LEFT JOIN procedurelog p1 ON a.AptNum = p1.AptNum  
WHERE a.AptStatus = 5 AND (DATE(a.AptDateTime) BETWEEN @FromDate AND @ToDate)  
GROUP BY a.AptNum  
ORDER BY DATE(a.AptDateTime);
```

You can copy and paste this query into your MySQL client to retrieve the desired information. Just make sure to adjust the '@FromDate' and '@ToDate' variables to specify your desired date range.

Message ChatGPT

ChatGPT can make mistakes. Consider checking important information.

Overhead and Cashflow: Understanding your office cashflow and overhead expenses allows you to understand the ongoing costs required to run your practice such as rent, utilities, salaries, and supplies.

Knowing these costs helps you identify where you might be spending too much. Reducing overhead can directly increase your practice's profitability.

As a leader in the practice, this will help you in budgeting and forecasting future financial needs. It allows you to plan for big expenses, like new equipment, expansion, salary increases and hiring.



How Do You
Know The
Right
Numbers To
Track?

Understanding Expenses

First start with understanding “**Fixed and Variable**” expenses.

Fixed Expenses are costs that do not change regardless of how much a business operates. These costs remain the same every month, making them predictable and easier to budget for.

- Facility/Equipment
- Rent/Mortgage
- Payroll

Understanding Expenses

Variable expenses fluctuate based on the level of practice activity. These costs increase as a practice ramps up its operations and decrease when activity is lower.

It's the low hanging fruit!

Variable expenses are important to track so that we can make sophisticated decisions when it comes to budgeting.

- Lab Expenses
- Supplies
- Marketing

- Supplies 5%, ideal 4.5% or lower
- Lab 9%, ideal 7% or lower
- Combined Supplies/Lab = 14%, Ideal 11.5%
- Marketing 4.5% (depending on situation)
- Office expenses 1.2%
- Other expenses 5.5%, ideal 4.5%
- Merchant fees
- Pt. refunds
- Cont. Edu



DSI's Ideal %

It's Not Girl Math

Supply-Budget-Tracking-Master .XLSX

File Edit View Insert Format Data Tools Help

100% Calibri 12


Month 1 Collections


A	B	C	D	E	F	G	H
Month 1 Collections	Month 2 Collections	Month 3 Collections	3 Month Average	4.3% Supply Budget		Supply Bonus Incentive	Budget Goal
\$145,045.00	\$181,898.00	\$181,898.00	\$169,613.67	\$10,176.82			\$10,176.82
Supply Budget Tracking							
Order	Order Source	Order/Invoice #	Description	Amount Spent	Budget Remaining		
Back Office Supplies	Darby	3333333	Temp	\$500.00	\$9,676.82		
Front Supplies	Walmart	3333	Breakroom SNACKS	\$150.00	\$9,526.82		
				\$1,200.00	\$8,326.82		
					\$8,326.82		
					\$8,326.82		
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					\$8,326.82		

 **Shayna Ryleigh**
@ryleighvc Follow

Cam invented girl math

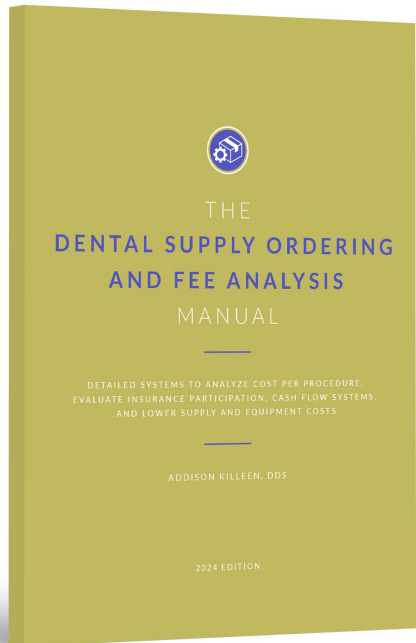


 no context sitcoms @... · 1/21/24
who got that one sitcom clip

 itsmodernfamilyquotes Follow 14.4K

Cam bringing the girl math into the equation ...

Time Management Doesn't Mean finding Time. It means finding ways to work efficiently and productively. Use your resources!



When will I have time?

To access
presentation
scan the QR
code below



SCAN ME



Sydney Robinson
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817-823-2655

Join FOA
Today



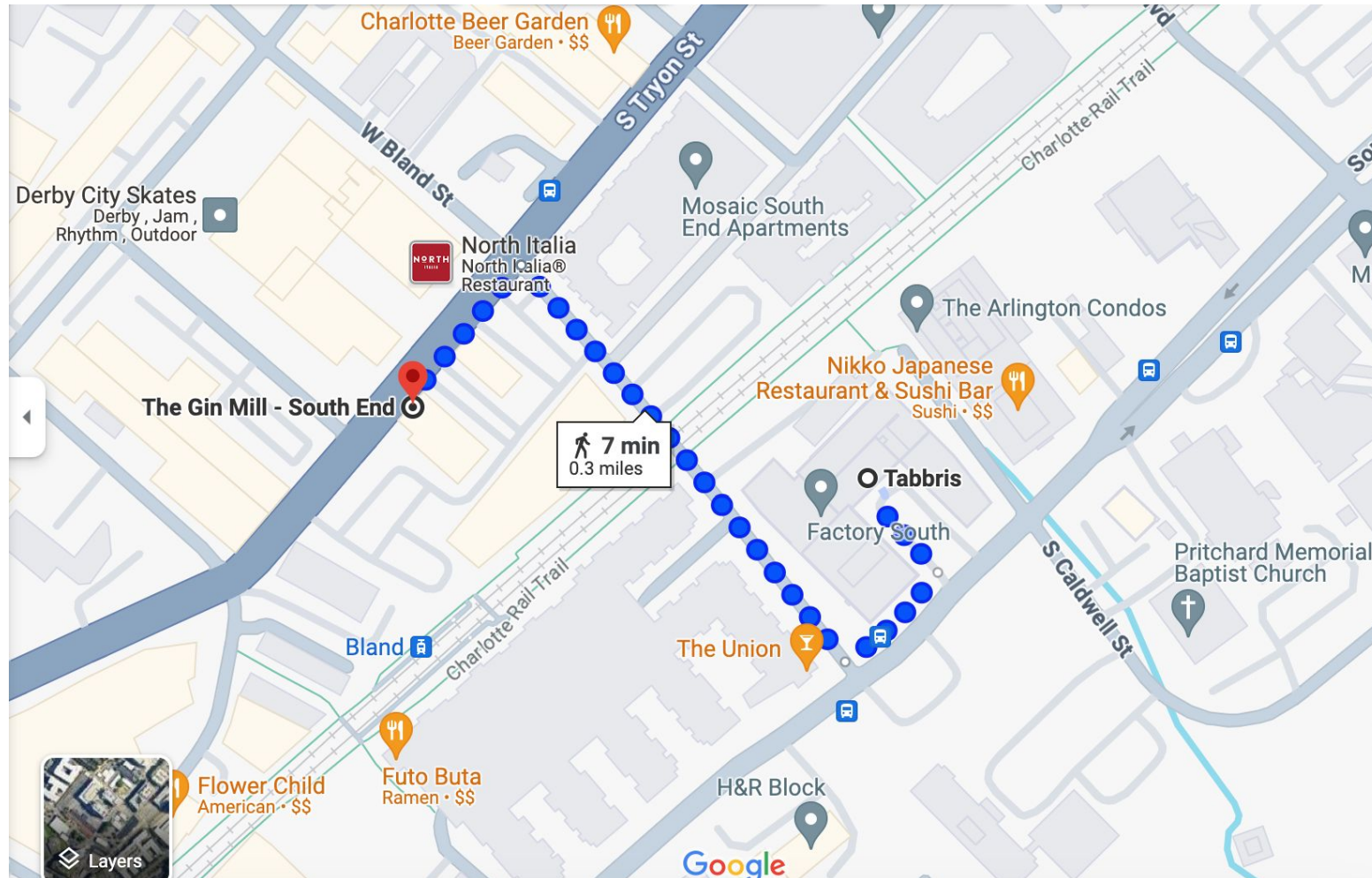
SCAN ME



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The Gin Mill

1423 S Tryon St, Charlotte, NC 28203



Save The Date!

November 2024 Denver



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