5 Ways to Increase Your Practice Productivity

That You Can Start Doing Today

HENRY SCHEIN®

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About the Author

Denise Ciardello always knew she wanted to be an entrepreneur, and today, she is co-founder of Global Team Solutions (GTS), a practice management consulting firm. She is also a professional speaker and published author who brings experience, insight and creativity into her consulting, along with a sense of humor. Denise's industry distinctions include serving as president of the Academy of Dental Management Consultants and membership in the National Speakers Association, the Hill Country Women in Business, Toastmasters International, and Directory of Dental Speakers. She has been a Certified Trainer since 2005 and is a past winner of the Trainer of the Year award.

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The Secrets of Productive Practices

"I need new patients more than anything else right now because my business is declining."

These are words no one ever wants to say.

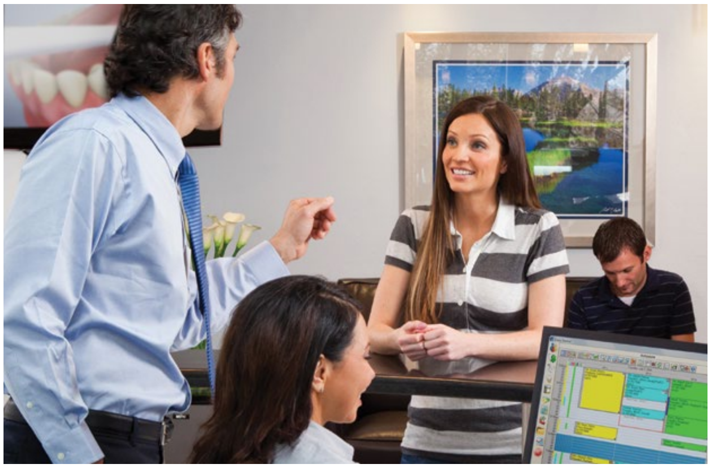
Unfortunately, I've taken this dental office "emergency call" many times. How do practices get to this point? What could they have done to avoid the pitfalls?

When I go into practices to triage their business emergencies, I often find that the answers are simpler than many thought possible. I explain to my clients that the secret to having a profitable dental practice is to consistently monitor a few key things that will keep the businesses strong, thriving and growing. Here's what I recommend:

- Ensure that every member of your office gives superior customer service.
- Be aware of patient activity, including staying on top of accounts and not letting patients fall through the cracks.
- Always be aware of the big financial picture.
- Know what members of your practice are doing and if everyone is meeting production/collection goals.
- Maximize the benefits of the technology that works best for you.

There's no need to stare at an empty schedule or write another check for advertising that isn't bringing in new patients. In this eBook, I'll walk you through my expert tips that can get your practice humming again—or keep it that way. Here are the five things you can start doing today to have the most productive and efficient practice.

Tip 1: Make a Personal Connection



In our fast-paced world, so many of our personal connections are—well, impersonal. It's becoming increasingly harder even to make eye contact with someone in conversation.

Your patients need that personal connection to feel appreciated. Great customer service costs your practice nothing yet it could benefit you a great deal.

Take a moment to interact with each patient. SMILE! Create a culture where people are glad that they chose, and continue to choose, your office. Remember, patients are not an interruption: they are the reason that you are there!

Another simple way to deliver stellar customer service is to have a quick daily huddle with your team to review information for patients coming in that day. Patients will feel valued when you call them by name, know who referred them and understand what their concerns are.

Send welcome letters and thank-you notes for another nice personal touch. Don't forget that something as simple as a notification that an appointment is scheduled (or that one needs to be scheduled) can bring a patient in. It's often these little things that make the biggest impact.

You may have great customer service, but you also need to consider your patients' reactions to your office itself. An exercise I use is to sit in an operatory that isn't being used, or sit in the waiting area, and try the following:

Bite on This

Henry Schein Easy Dental helps you make that important personal connection with your patients.

Know who your patient is.

With Easy Dental Appointment Manager you can see everything you need to prepare for a patient interaction, including a picture, information and notes of previous conversations.

Know what your patient thinks.

Easy Dental Satisfaction Surveys let you always know what your patients think of your service. Plus, the results are tabulated so you can track the improvement of the patient experience.

Increase patient referrals.

The Easy Dental Communication Manager automatically prompts your patients for a referral after they have completed a positive satisfaction survey. This is an effective and inexpensive way to grow your patient base.

Tip 1: Make a Personal Connection (continued)

Lie back in the chair. What do you see? Are there bugs in the light? Is the counter cluttered? Is the trash overflowing? Does the operatory feel clean? Listen to the sounds around you. How is the phone being answered? When the clinical team retrieves the patient from the reception area, how is the patient called back? What are the conversations throughout the office? Is your team projecting the culture that you desire for your practice?

By doing this exercise regularly with your whole team, you can identify areas where you can improve, and you'll have an office that is appealing for your patients. That's critical, because that patient you are talking to, whether on the phone or in person, is a walking billboard! In one study, 52 percent of people reportedly chose their dentist based on a referral from friends and 43 percent from a family member. Twenty-seven percent of all referrals came from a current or former patient (Source: Journal of Dental Education, June 1, 2012). Each patient you interact with could be your next referral source, an advocate for your practice, the one that could put you over the top for your monthly goals.

So take the time. As each member of your team makes patients feel valued in every interaction, you will reap the rewards of a happy, buzzing office.

Tip 2: Remember the Three Rs

The three Rs you learned in school were important, but for a healthy and productive dental practice, you need to master these:

- Recall
- Reactivation
- Referrals

Dentists pour a great deal of effort and money on external marketing to try to attract new patients, but they forget the treasure trove they already have: their patient list. Revitalize your practice by using this incredible resource.

- **Recall** is truly the heartbeat of the practice. When patients are having regular visits in the hygiene chair, you will benefit from their repeat visits as well as revenue from any treatment you recommend. Your patients will benefit by receiving excellent oral health care and having their concerns quickly diagnosed. By reminding your patients that studies link the connection between the mouth and the body for overall health, you can solidify the importance of their routine cleanings (See Mayo Clinic, Oral Health: A Window to Your Overall Health, May 2013).

  In your morning huddles, get your entire team thinking about RECALL. If they do this at every step, you will continue to keep the schedule full. Having the assistant

Bite on This

Henry Schein Easy Dental makes recall, reactivation and referrals a breeze.

Recall your patients.

Automate dental recall cards with Easy Dental Communication Manager. Also, remind your patients of the importance of routine cleanings. Keeping the hygiene schedule full will also help keep the restorative schedule full.

Reactivation made easy.

Use Easy Dental Appointment Manager to create a targeted reactivation list by viewing patient contact information and eligibility status. Then make a standard script so everyone in the office can approach patients the same way.

Focus on referrals.

Track your referrals with the Easy Dental Referral Manager so you always know where your best referrals are coming from. This helps you cultivate more patients and keeps your practice thriving.

Tip 2: Remember the Three Rs (continued)

bring the list of patients coming in that day without a recall appointment already scheduled, the doctor knows who to talk to about the importance of that next hygiene appointment. Then at the conclusion of the treatment appointment, the admin team will know they need to schedule the patient for another appointment.

A good rule of thumb for a general practice is that 33 percent of your overall production should be coming from procedures performed in the hygiene chair, meaning everything but exams. (This percentage will be much higher in a pedodontist's office and significantly lower in most other specialists' offices.) Remember: when you keep the hygiene schedule full, the restorative schedule will stay full as well.

- **Reactivation** goes hand in hand with recall. Getting previous patients back into the office is much easier than attracting new patients, since patients who have been in before are already familiar with the office, the dentist and the team.

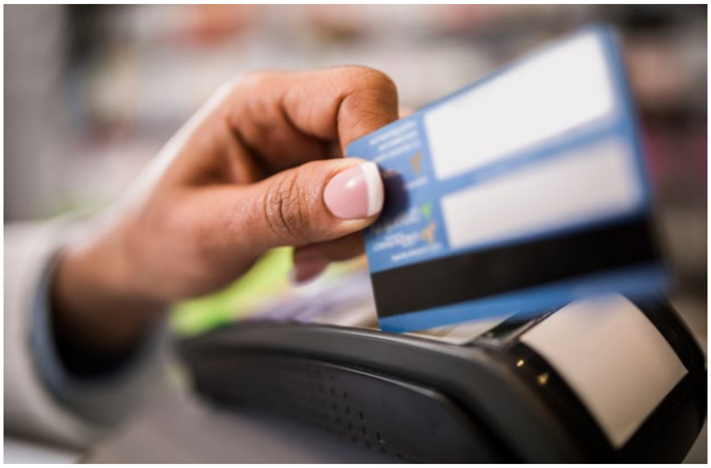
  Make your reactivation campaign methodical. Start with your practice management (PM) software, which should have reports telling you who these patients are and how to locate them. Your team may need to divide up the list to tackle it. Create a standard script so everyone can approach patients in the same way. Make–and most importantly, write down your goals, get everyone on board and hold them accountable.

- **Referrals** are the third R of a healthy practice. Do you know what your patients are saying about you? Americans tell an average of 9 people about a good experience, and they tell up to 16 (nearly two times more) people about their poor experiences (Source: American Express Survey, 2011). This is why it's so critical to your business that patients leave with good things to say about your office, because up to 70 percent of your new patients will be personal referrals.

  Spread the word. Asking your patients for referrals lets them know that you are accepting new patients. To accelerate referrals, consider sending thank-you cards for patients that refer others or having a referral campaign with a drawing for all the patients that refer friends and family members to your practice.

  Remember that it's not enough to get referrals—you also need to track them. "I just remember" is not a good game plan! Instead, use the power of your dental software to track referrals, and then you can use the referral report in monthly team meetings to continue to promote what is working and enhance your marketing for this valuable resource.

Tip 3: See Your Financial Big Picture



It's easy to get so focused on giving excellent care to patients that you may lose sight of the fact that your practice is a business. Thriving practices understand that both are critical to success.

Your practice's financial health all begins with your financial policy. It's deceptively simple, but consider what you gain when these expectations are set up front:

- When patients will pay their portion
- Methods of payment your office accepts
- Explanation of any in-house payment plan
- Details of third-party patient financing, such as CITI Health Card, Care Credit, etc.

Much of your financial headaches come from trying to resolve issues stemming from your expectations that, for whatever reason, may not have been clear to patients when they received treatment. Going over your financial policy with patients before doing any work will greatly ease these administrative headaches.

The fact is, you work hard to provide superior care and deserve to be promptly paid for it. When patients clearly understand their financial responsibility, the business aspects of your practice will become less of a burden, and you can focus on caring for patients again.

Bite on This

Henry Schein Easy Dental can quickly create professional patient treatment plan estimates.

Enter a few numbers, then print.

By adding in your insurance fee schedules into Easy Dental, you will be able to feel confident that you are providing your patients with the best estimate possible for accurate patient portions and co-pays. If you are a fee-for-service office, you have a choice of providing this information to your patients as a courtesy for quality patient communication.

Easy Dental automatically breaks the numbers down into understandable dollar amounts, so patients comprehend their insurance benefit and what will be expected for them to pay out of pocket.

Tip 3: See Your Financial Big Picture (continued)

Take a Minute to Help Patients Understand

By giving the patients a general idea of what procedures will be covered by their insurance and at what percentage, they'll know better how to use their benefits intelligently. Then they will understand how and when they are expected to provide payment to you themselves.

Have the Financial Discussions First

Before you even schedule any appointments for planned treatment where payment will need to come from both the patient and insurance, you need to discuss with patients how much and when they are going to pay.

This is true even in case of emergency treatments. Discuss payment before emergency patients are numbed up, so they can make an informed decision about what they are able to pay for and then receive only those services.

If the doctor is in the middle of treatment and the treatment plan changes, it can be hard to stop and consider the financial aspects, but if possible, find a place to pause and let the financial coordinator come in and give the patient a quick update. I recommend that the assistant be in charge of reminding the doctor with a cue like, "Doctor, do we need to have Betty come in and give Mrs. Gonzalez an update on how the insurance may change at this point?"

The bottom line is that having these financial conversations before treatment will prevent awkwardness, unwanted surprises and any hard feelings afterward, so your patients will leave satisfied and happy to come back.

Tip 4: Reports are Key

Management consultant Peter Drucker wisely noted, "If you can't measure it, you can't improve it." Reports are critical in measuring the health of your practice at any moment. You must know what reports to run, when to run them, and how to use them in order to continually improve. Here's the what, when and why of the reports you need:

Daily

- **Day sheet.** When the doctor takes 10 minutes at the end of each day to look over production and collection numbers, it is much easier to remember what procedures were performed than coming back and trying to remember a month later. This review ensures the accuracy of patient records and helps the doctor remain aware of the all ledger activity for the day.
- **Adjustments.** This is the second report the doctor needs to look over daily to keep an eye on what money has been adjusted out of the practice's bank account. This step is key to maintaining strong internal controls and promoting operational efficiency.
- **Deposit slip.** Every day, balance all of the funds (including insurance checks, personal patient payments, credit card payments and electronic funds) that have come into the office. Doing this daily means your balances will be accurate and always up to date. If you put it off, mistakes unfortunately will continue to advance.

Weekly

- **Insurance aging.** By running this report on a weekly basis, or at a minimum biweekly, you will avoid having to wade through claims that could be 60 days outstanding. Many insurance companies require timely filing; tracking outstanding claims on a more regular basis will help prevent delayed claims and result in quicker payment.
- **Accounts receivable.** Running this report weekly enables you to constantly apprise where the money is

Bite on This

Henry Schein Easy Dental will help catch valuable revenue possibly slipping through the cracks with these additional weekly reports:

1. **Procedures not attached to insurance.**

These procedures have been completed, and the patient has insurance, but a claim has not been generated. This report is a safety net to catch those ungenerated claims.

2. **Insurance claims not sent.**

Another aspect of the safety net, this report catches claims that were created but never sent to insurance. (After you identify missing claims in these two reports, you can go into patients' accounts in Easy Dental to fix the issues, and the software will automatically batch and submit the claims electronically.)

3. **Recall report.**

This finds patients who are due for their hygiene appointments but are not on the schedule.

Continued on next page.

Tip 4: Reports are Key (continued)

coming from and what patients still owe. You can also use the scheduling feature in your practice management software to send statements on a weekly or biweekly basis to different groups in your database. You'll simplify your bookkeeping, avoid the rush of phone calls and get more money coming in on a regular basis.

Monthly

- **Practice analysis.** Look at what you did this month and compare it to previous month. Is your team meeting their production and collection goals? What are you doing well, and how can you improve? Also note the hygiene numbers and comprehensive exams compared to the number of new patients, since those numbers should be about the same. If new patients come in for emergency treatment, your goal should be to convert them to regular patients.
- **The audit trail.** Although often overlooked–or even worse, never run at all–this is one of the most important reports for keeping a finger on the pulse of the back end of the practice. It may be boring but is oh, so important. If you don't know how to run or use this report, it's worth the time and effort to learn how to use the information.

Now that you know what reports will be most beneficial for a thriving practice, put your efficiency into high gear with these two final ideas: Spread out the work by scheduling reports to run on the same day every week (one report every Monday, another every Tuesday, etc.). If your office is open on Friday, run insurance reports later in the week, and you can get right through to the insurance company because they have fewer calls that day.

Bite on This

4. Unscheduled treatment report.

This identifies patients who had treatment presented but have delayed scheduling it. Getting these patients back in for treatment means instant revenue.

With Easy Dental eServices, you can also automatically send reminders and start filling in holes in your schedule immediately.

Tip 5: Maximize Your Tech

Are you going digital? It can be a big change and maybe even a little scary. But productive practices understand that they can harness technology to make their work faster and easier.

For instance, many dentists have moved to digital X-ray cameras. It's a significant investment—and it more than pays for itself when you consider just a few of the benefits (See Oral Surgery, Oral Medicine, Oral Pathology, Oral Radiolology Journal, March 2001):

- You have instant images to view and discuss.
- You can send digital images electronically with insurance claims, and since electronic claims are paid more than twice as quickly as paper claims, you get paid faster.

Record keeping and maintenance becomes easier, with all patient files and X-rays kept safe and organized.

Consider another tech investment you probably have: practice management (PM) software. It's great to have such a powerful tool—but the tool is truly only as good as the person using it.

Take a good look at the main page of your PM software. Are there icons that you are not using? Maybe you have a charting system in your software but prefer to put it in the paper chart because that's the way that you have always done it. Or you've put learning all of the possible helpful software features on the backburner.

Bite on This

Affordable to own, simple to learn and easy to use.

So many practice management solutions are incomplete or difficult to use, bloated with hard-to-understand features you'll never even need.

Not Easy Dental. It's the best solution for budget-conscious practices, giving you powerful features without the cost of complex, expanded feature sets.

Easy Dental provides complete management and clinical tools with the ability to add new functionality when a practice grows. That's why over 10,000 dental practices trust Easy Dental.

Turn Your Staff into Specialists.

With Easy Dental, you're never more than a phone call, email or website away from expert advice, effective training options and exceptional add-on services.

Tip 5: Maximize Your Tech (continued)

You've made the investment, so put your software to work for you. Learn how to use the functions that will simplify your life. You may even need to get a training session to help, but it's worth it. Training is one of the best investments you will make in your practice and in your team. What may be a minor inconvenience in the short run will reap huge dividends for your business in the long run.

As you streamline and simplify your work by really understanding how to use your PM software, you will save time–no more pulling, filing or looking for lost charts. Your patient's entire dental chart will be in one place that anyone on your team can put their finger on immediately. Sharing this information with a specialist, along with filing the insurance claims, goes from being a chore to being quick and easy.

Technology is here to stay. The good news is, if you know how to use it the right way, you can see increased productivity with less work for your entire staff. And that's worth a lot.

Take Your Practice to the Next Level

Developing a thriving and productive practice can be challenging at times, yet it's within your reach when you pay attention to the several moving pieces that combine to create success. A foundational piece of the solution is smart practice management software. Henry Schein Easy Dental is the easiest, most affordable solution, designed to be powerful yet simple. It streamlines and automates processes and daily operations so you can focus on your practice.

Easy Dental is complete practice management software that gives you:

- A more efficient claim submission process so you are paid quicker
- Reports and planning tools that help increase recalls and collections
- Stronger internal controls
- More accurate record keeping
- An easy-to-use patient schedule at your fingertips
- Templates to create professional-looking treatment plans
- Access to powerful tools with integrated eServices that you need now to help grow with your practice

Easy Dental is backed by quality customer service and support from Henry Schein, Inc., the world's largest provider of health care products and services to office-based dental practitioners.

Discover the peace of mind you'll get with Easy Dental as your work gets more efficient and practice productivity increases.

Great practice management software doesn't have to be complicated!

Call 1.800.768.6464 today to see how easy it can be.