

## Attaining your New Year's 2017 Resolutions

You already have some version of the **9 major systems** in place, but you might want to create a higher level of sophistication for better control. To do so you can:

1. Simply analyze what you now have and find ways to improve it
2. Use "Management Kits" to self-optimize that major system
3. Hire a consultant to guide you through the improvement of a major system
4. All of the above

If you want to analyze what you have and try to improve it, it is probably best to use the sub-systems of that major system approach (see the sub-systems below).

If you want a more sophisticated approach to optimizing any of the 9 major systems you can use any of the management kits below:

**"Team Organization & Hiring Kit"** containing:

Team Organization (production, staffing position levels & delegation)

Team Hiring (seeking, testing, interviewing, selecting possible team members)

Financial Control (charges, collections & payables...typically computer-related)

**"Team Member Training Kit"** (legal & ortho orientations, training sequences, demonstrations)

**"Team Scheduling & Tx Quality Control Kit"** containing:

Team Scheduling (stats, Tx Mech, appointments, staffing/Appt. calculations, design, control)

Tx Quality Control (Tx Mechanotherapy, Periodic Pt. Reviews and Pt. Training)

**"New Pt. Experience, TC Programs Kit"** (consults, fees, follow-up, OBS, communications)

**"Goal Attaining & Reporting Kit"** (set goals, monitor progress, make changes)

**"Associates & Partners Transition Kit"** (partner/associate types, compatibility, shared Mgmt)

If you want to hire an orthodontic consultant to guide you through the improvement, seek out those who have experience in the major systems you want to improve.

If you want to improve any of the **45 sub-systems** (which enhance the 9 major systems), simply choose ☒ which of the sub-systems you want to clean up or create in your practice.

Choose among the **8 Sub-Systems** of **Team Organization**:

- ☐ Resolve the "Staffing Problems" (don't be overstaffed or understaffed)
- ☐ Automate your Team Management (to set realistic team position responsibilities)
- ☐ Create a Balanced Practice Personality (to better interact with your team and patients)
- ☐ Vaccinate yourself against the "Dismoral Virus" (to avoid team mutiny)
- ☐ Vaccinate yourself against the "Embezzlement Virus" (to avoid loss)
- ☐ Play the "Relationship Game" (for more positive team relationships)
- ☐ Use "Mind Set" (for more positive team relationship)
- ☐ Developing Strong Practice Leadership (for better team Coordinators and control of position tasks)

Choose among the **4 Sub-Systems** of **Team Hiring**:

- ☐ Don't become liable with new applicants (to protect you and them)
- ☐ Negotiate Salaries & Benefits (for an understanding between of what's to come)
- ☐ Create an Office Policy Manual (so that she knows the rules and agrees to them)
- ☐ Know when and how to terminate/replace staff (to keep your team harmonious and effective)

Choose among the **9 Sub-Systems** of your **TC Program**:

- ☐ Learn how to Effectively Sell your cases (for more enthusiastic starts)
- ☐ Create a Fees & Financial Arrangement Schedule (for more starts and better financial control)
- ☐ Make your Fees More Acceptable (for more starts)
- ☐ Resolve the Records Fee Dilemma (for more starts and less "records frustration")
- ☐ Create your Ongoing Communications System (for more referrals and better patient cooperation)
- ☐ Control your Will-Call-Back patients (for more starts with the exams you already had)
- ☐ Create your OBS & Ph-I Retn Recall Control System (for more OBS and Ph-II Starts)
- ☐ Create your Transfer Patient Control Philosophy (for better financial & Tx quality control)
- ☐ Create your Run-On Patient Control (to resolve the cases that got away from you)

Choose among the **4 Sub-Systems** of **Team Training**:

- ☐ Don't Lose those Great New Hires (by bringing them on too slowly or too quickly)
- ☐ Protect yourself from OSHA (using a comprehensive Legal & Ortho new hire orientation)
- ☐ Improve your HIPAA PROGRAMS (to be legally compliant and protect your patients)
- ☐ Evaluate your Team's Abilities (to know where they need to improve)

Choose among the **4 Sub-Systems** of **Team Scheduling**

- ☐ Use a Rotation Schedule & Vertical Calendar (to maximize your patient availability)
- ☐ Control your Schedule System (when patients mess up your perfect day)
- ☐ Optimize your Daily Patient Flow (because you need more than a schedule)
- ☐ Get the Doctor In to & Out of the Exam on time (to stay on schedule)

Choose among the **6 Sub-Systems** of **Goal-Attaining & Reporting**

- ☐ Create your Marketing Programs (to reach your patient market and let them know you exist)
- ☐ Create a Website that Works (to make those who reach it want to have treatment by you)
- ☐ Consider Alternative Tx Mechanotherapies (Invisalign, lingual, etc., to broaden your adult market)
- ☐ Create better PCD Referral Control (to encourage referring dentists to send more patients)
- ☐ Create a Team Bonus System (a win-win system to inspire your team to grow your practice)
- ☐ Create Exceptional Patient Visits (that stimulate patient referrals)

Choose among the **5 Sub-Systems** of **Tx Quality Control**

- ☐ Create/Improve an Effective Tx Mechanotherapy (to effectively treat all of you patient's malocclusions)
- ☐ Complete your Run-on Cases (and keep your Estimated Completion Date)
- ☐ Create your Periodic Pt. Review System (to keep your Estimated Completion Date)
- ☐ Create your Pt. Training & Cooperation System (for better patient cooperation & less run-ons)
- ☐ Create SOS, and Failures/Cancellation Systems (for a smoother schedule and faster treatment times)

Choose the **1 Sub-System** of **Associates & Partner Transitions**

- ☐ Combine your Ortho with a Pedo Practice? (you need to understand the pros & cons first)

Choose among the **4 Sub-Systems** of **Financial Control**

- ☐ Create your Daily Cash Control system (to make sure that what you collect goes in the bank)
- ☐ Create your Past Due Control system (to make sure you collect all that is due you)
- ☐ Create you're A.P & Payroll system (to account for the expense aspect of business)
- ☐ Create you're Purchasing (supplies) Control system (to lessen waste and expense)