

Attaining your New Year's 2024 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 **69 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 and look them up in the **Management Pearls listing PDF on: www.DrDeanBellavia.com**.

Choose among the **10 Sub-Systems of Team Organization (See Management Pearls):**

- ☐ Resolve the "Staffing Problem" (don't be overstaffed or understaffed)
- ☐ Automate your Team Management (to set realistic team position responsibilities)
- ☐ Create a Bonus System (that works for the team and practice)
- ☐ Keeping your Team Busy (when the doctor is not in the office)
- ☐ Developing Strong Practice Leadership (for better team Coordinators and control of position tasks)
- ☐ 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)

Choose among the **5 Sub-Systems of Team Hiring (See Management Pearls):**

- ☐ Don't become liable with new applicants (to protect you and them)
- ☐ Negotiate Salaries & Benefits (for an understanding between of what's to come)

- ☐ Update your Office Policies Manual (so they know what to expect of you and you of them)
- ☐ Know when and how to terminate/replace staff (to keep your team harmonious and effective)
- ☐ Keeping up to date with OSHA & HIPAA (to protect your team/patients and stay legal)

Choose among the **12 Sub-Systems** of your **TC Program** (See Management Pearls):

- ☐ Learn how to Effectively Sell your cases (for more enthusiastic starts)
- ☐ Overcoming the “TC Personality Dilemma” (to increase your conversion rate)
- ☐ 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”)
- ☐ Getting the doctor into/out of the exam (don’t waste your time and that of the patient’s)
- ☐ Starting the Most Exams Possible (don’t lose starts from the exams you have)
- ☐ Create your Ongoing Communications System (for more referrals and better patient cooperation)
- ☐ Getting your Will-Call-Back patients started (for more starts with the exams you already had)
- ☐ Getting “The Forgotten” started (Create your OBS & Ph-I Retn Recall Control)
- ☐ 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** (See Management Pearls):

- ☐ 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 **5 Sub-Systems** of **Team Scheduling** (See Management Pearls):

- ☐ Maximize your market “availability” (Using a Rotation Schedule & Vertical Calendar)
- ☐ Staying on Schedule (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)
- ☐ The Receptionist Personality Dilemma (help he do a better job of scheduling)

Choose among the **8 Sub-Systems** of **Tx Quality Control** (See Management Pearls):

- ☐ 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)
- ☐ Don’t let SOS-Failures-Cancels Compromise your Tx (for a smoother schedule and faster Tx times)
- ☐ Are your Emergencies under control? (how to better handle daily SOS/Emergencies)
- ☐ Is Indirect Bonding for you? (evaluate the pros and cons and make your choice)
- ☐ Is Dental Monitoring for you? (evaluate the pros and cons and make your choice)

Choose among the **11 Sub-Systems** of **Goal-Attaining & Reporting** (See Management Pearls):

- ☐ Set Realistic Goals (and then attain them)
- ☐ 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)

- ☐ Protect your Website from Hackers (and protect your patient information)
- ☐ 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 the **6 Sub-System** of **Associates & Partner Transitions** (See Management Pearls):

- ☐ Are you the Associate/Partner type? (don't do it unless you are)
- ☐ Combine your Ortho with a Pedo Practice? (you need to understand the pros & cons first)
- ☐ Compensating an Associate? (don't pay too much or too little)
- ☐ Can you Afford to Retire? (make sure you have the resources you need)
- ☐ What is your practice Really Worth? (don't under or overprice its value)
- ☐ Create a realistic "Mutual Non-Disclosure Agreement (to protect your practice, team and associates)

Choose among the **8 Sub-Systems** of **Financial Control** (See Management Pearls):

- ☐ 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)
- ☐ Where's the Money, Part-I: Production (maximize your product with what you have)
- ☐ Where's the Money, Part-II: Collections (maximize your collections from what you produce)
- ☐ Where's the Money, Part-III: Net (keep as much of your collections as possible)
- ☐ Are Credit Checks Really Necessary? (what is best for you)