How Does Your Practice Rate?

Sit down, relax with a beverage and evaluate your great practice.

Check off the two Production Levels your practice is presently at:

- By Yearly $ Production: ☐Level-1 (<$1million) ☐Level-2 ($1 to $2 million) ☐Level-3 (> $2 million) *per doctor*
- By FS/D Production: ☐Level-1 (<1.00) ☐Level-2 (1.00 to 2.00) ☐Level-3 (> 2.00) *per 1-doctor day*

> FS/D = (Full + Ph-II Starts) + 0.35 x (Ph-I + Lim Starts + Aligner Starts) ÷ Tx Days/yr
>
> **Your:** [____ Full/Ph-II Starts + 0.35 x (____ Ph-I/Lim)] ÷____ Days/yr = ___.___ FS/D

1: Rate Your Team Organization Systems:

- For <1.00 FS/D (Level-1) you need 4 or less full time team members   you have ____staff   ☐OK ☐Understaffed ☐Overstaffed
- For 1.00 – 2.00 FS/D (Level-2) you need 5 to 9 full time team members   you have ____staff   ☐OK ☐Understaffed ☐Overstaffed
- For >2.00 FS/D (Level-3) you need 4 or less full time team members   you have ____staff   ☐OK ☐Understaffed ☐Overstaffed
- Do you have all of your team position's tasks defined and automatically performed? ....☐Yes ☐No ☐Need to Improve
- Do you have a team morale problem? (problem_____)........☐Yes ☐No ☐Need to Improve
- Do you feel that your team is a: ☐team (bonded) or ☐group of individuals (self-serving)? ....☐OK ☐Need to Improve
- Is your *Practice Personality* balanced…are you more ☐people (fun) or ☐task (serious) oriented?..........☐OK ☐Need more balance
- The *Doctor's Personality* is: ☐socializer (fun) ☐Analyzer (serious) ☐Director (tense) ☐Relator (easy) ......☐OK ☐Need more balance
- Is the doctor (or certain team members) overly emotional? ☐Gleeful ☐Fearful ☐Angry ☐Sad .... ☐OK ☐This Needs work

2: Rate Your TC Program Systems:

- Does your TC have the desired "personality", "Mental Skills" and "Attitude" to be most effective? ......☐Yes ☐No ☐Need to Improve
- Does your TC do all the procedures required to get the patient started when ready to start? ....☐Yes ☐No ☐Need to Improve
- Do you have acceptable fees an Financial Agreements? ....☐Yes ☐No ☐Need to Improve
- Does your DOCTOR spend between 10 and 15 minutes in an exam?...................... (you ____min) ....☐Yes ☐No ☐Need to Improve
- Is your *Exam* Conversion Rate = [(Full + Ph-I + LIM + INV Starts) ÷ (Total Exams)] over 75%? .....(you ____%) ....☐Yes ☐No ☐Need to Improve
- Is your *Ph-I/II* Conversion Rate = [(Total Ph-II Starts) ÷ (Total Ph-I Starts)] over 75%?..........(you ____%) ....☐Yes ☐No ☐Need to Improve
- Is your *OBS* Conversion Rate = [(Starts from OBS) ÷ (N.P. Exams placed on OBS)] over 65%? ...(you ____%) ....☐Yes ☐No ☐Need to Improve
- Are your Pt./Family referrals greater than 50% of your New Pt. Exams?   (your ____%) ....☐Yes ☐No ☐Need to Improve
- Does your TC know how to "sell" your orthodontics? ....☐Yes ☐No ☐Need to Improve
- Does your practice know how to effectively handle "transfer-in" patients? ....☐Yes ☐No ☐Need to Improve

3: Rate Your Team Training Systems:

- Do you have an organized, programmed team training system? ....☐Yes ☐No ☐Need to Improve
- Do you do a *Legal Orientation* (new team member's OSHA, HIPAA, etc., training done on day-1)? ...☐Yes ☐No ☐Need to Improve
- Do you do an *Orthodontic Orientation* (to teach her *your* orthodontics on day-2+)...............................☐Yes ☐No ☐Need to Improve
- Does your *Demonstration Technique* trains her to do a task *in minutes*, not hours)............................☐Yes ☐No ☐Need to Improve
- Does *your* complete DA Training Program take about a month? (yours is _____months) ....☐Yes ☐No ☐Need to Improve
- Do you use an *Evaluation System* to determine who needs to be trained in what tasks?.....................☐Yes ☐No ☐Need to Improve
- Does your *Evaluation System* take their "Attitude" into account?...☐Yes ☐No ☐Need to Improve

4: Rate Your Team Scheduling Systems:

- Is your scheduling system based on your Tx Mechanotherapy (Tx services)? ....☐Yes ☐No ☐Need to Improve
- Is your scheduling system productive? That is, is it above 1.00 FS/D?   (yours above =____) ☐Yes ☐No ☐Need to Improve
- Do you maximize your patient market with a ☐Rotation Schedule ☐Vertical Calendar? ....☐Yes ☐No ☐Need to Improve
- Do you effectively control your daily Early, Late & SOS patients? ....☐Yes ☐No ☐Need to Improve
- Do you know how to optimize your daily patient flow to make it smoother? ....☐Yes ☐No ☐Need to Improve

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5: Rate Your Tx Quality Control Systems:

- Do you have an efficient and effective Tx Mechanotherapy? ....☐Yes ☐No ☐Need to Improve
- Do you do Periodic Patient Reviews & Reports on both cooperating and non-cooperating patients?..☐Yes ☐No ☐Need to Improve
- Are your SOS/Emerg. <8%?   (% SOS = AVG SOS/Emerg./Day ÷ AVG Pts/Day])   (yours =_____%) ....☐Yes ☐No ☐Need to Improve
- Do you have a system to create greater patient cooperation (letters & training)?.................................☐Yes ☐No ☐Need to Improve
- Do you have a system to keep your run-on patients under control? ....☐Yes ☐No ☐Need to Improve

6: Rate Your Team Hiring Systems:

- Do you have an organized hiring system to seek and hire the right person the first time?...................☐Yes ☐No ☐Need to Improve
- Do your evaluate the ☐Personality ☐Mental Skills & ☐Attitude of possible new hires?.....................☐Yes ☐No ☐Need to Improve
- Is ALL of your team involved in the selection of the most appropriate final applicant? ....☐Yes ☐No ☐Need to Improve
- Do you effectively negotiate salaries & benefits for new staff without causing team turmoil? ....☐Yes ☐No ☐Need to Improve
- Do you have a current "Office Policies & Benefits Manual" to read and sign when hired?...................☐Yes ☐No ☐Need to Improve
- Do you avoid liability when hiring new team members?..☐Yes ☐No ☐Need to Improve

7: Rate Your Goal-Attaining & Reporting:

- Do you have a Monthly Statistics Reporting System? ☐From computer system ☐Separate ....☐Yes ☐No ☐Need to Improve
- Do you set realistic monthly goals? ....☐Yes ☐No ☐Need to Improve
- Do you have a "Patient-Centered" Website? ....☐Yes ☐No ☐Need to Improve
- Do you have ongoing marketing programs in place?   ☐Yes ☐No ☐Need to Improve ..... Do they generate exams? ☐Yes ☐No
- Do you have Tx Mechanotherapies that attract adult patients? ☐Plastic Aligners ☐Lingual ....☐Yes ☐No ☐Need to Improve
- Do you use a Bonus System to stimulate growth? ....☐Yes ☐No ☐Need to Improve
- Do you use a Dental Communications (letters, etc.) to remind referring dentists you exist?.................☐Yes ☐No ☐Need to Improve

8: Rate Your Associate/Partner Systems:

- Are you the partner or associate TYPE?...☐Yes ☐No ☐Maybe
- Do you have a partner or associate?   For how many years?_____ ....☐Partner ☐Associate ☐None
- Do you get along with your partner or associate? ....☐Yes ☐No ☐Need to Improve Relationship
- Are you considering a partner or associate? In how many years? _____ ....☐Partner ☐Associate ☐Neither
- Do you have a PLAN for this possible partner or associate?...☐Yes ☐No ☐Need a Plan
- Do you know what your practice might be worth? .... ☐Yes ☐No ☐Need to know
- Do you know whether you can afford to retire or take on a partner? .... ☐Yes ☐No ☐Need to know

9: Rate Your Financial Control Systems:

- Are your Expenses under control (Budgeted?) and less than 55% (leaving a net >45%)? ....☐Yes ☐No ☐Need to Improve
- Do you have a Daily Cash Control system (to make sure all that is collect goes into the bank?) ....☐Yes ☐No ☐Need to Improve
- Is your $ Past Due <20%?   (% PD = [$PD/($PD + Avg Mo. Collections])   (yours =_____%) ....☐Yes ☐No ☐Need to Improve
- Do you have an organized Purchasing Control system? ☐Yes ☐No ☐Need Is it under control? ☐Yes ☐No ☐Need to Improve

Next, review all of your self-ratings above for the 9 major practice systems and give yourself an overall rating. Your practice is…

☐ in great shape and needs no systems cleanup   ☐ in good shape, but needs some cleaning up   ☐Needs a lot of work

The major systems that need attention are: ☐Team Organization ☐TC Programs ☐Team Scheduling ☐Team Training ☐Tx Quality Control ☐Team Hiring ☐Goal-Attaining ☐Associates/Partners & Retiring ☐Financial Control

See http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=204:chronological-listing&Itemid=766

and http://www.thebioengineeringco.com/index.php?option=com_hikashop&ctrl=category&task=listing&cid=16&name=ultimate-management-kits&Itemid=733

for help.