

ORTHOLYNC
INNOVATIVE SOLUTIONS FOR THE PATIENT EXPERIENCE

In collaboration with Profit Marketing Systems South, Inc.



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9/25/2015


**PROFITABILITY BY JOB DESIGN!
GROWING YOUR PRACTICE AS A TEAM!**

Profit
marketing systems south, inc.

**PRESENTED BY CHAR EASH
GLAO ANNUAL MEETING
SEPTEMBER 25, 2015**

9/25/2015

WHAT IS A SYSTEMS CONSULTANT?



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WHAT TO EXPECT FROM TODAY?

- INFORMATION
- CONVERSATION
- STRATEGIES
- SOLUTIONS
- LAUGHTER

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LET'S BEGIN BY TAKING BACK THE SPECIALTY!



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THANK-YOU FOR CHOOSING AN ORTHODONTIC SPECIALIST!

- CLAIM THE SPECIALTY
- CLAIM YOUR PATIENTS
- CLAIM YOUR NETWORK
- LET'S PAY ATTENTION TO THE SMALL STUFF!

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PRACTICE GROWTH

WILL BE
MEASURED BY
HOW WELL THE
TEAM WORKS
TOGETHER TO
GROW THE
PRACTICE!



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PRACTICE GROWTH IS A DIRECT
RESULT OF



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**NOT BY THROWING MONEY TO
THE WIND WITH GIMMICKS AND
QUICK FIXES!
WE NEED A GAME PLAN!**



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*PLEASE STAND!
IF YOU LOVE WHAT YOU DO!*



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LET'S TALK TEAM

- TRAINING YOUR TEAM IS THE GREATEST INVESTMENT FOR THE ORTHODONTIC PRACTICE TODAY!
- THE TEAM MUST BE EFFICIENT AND HAVE A GREAT ATTITUDE!

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80/20 PROCESS GONE!
TEAMS MUST WORK TOGETHER 100%+



A TEAM OF PROFESSIONALS!

1. BE PRESENT-IT IS WORK!
2. HYGIENE-APPEARANCE- UNIFORMS
3. CONFIDENTIALITY-TRUST
4. APPROPRIATE LANGUAGE
5. PUNCTUALITY
6. COMPETENCY-TRAINING SKILL SET
7. COMMITMENT – STEADFAST

CONTINUING EDUCATION! A GREAT TEAM TRAINING COURSE!

FIVE TRAITS OF A DYSFUNCTIONAL
TEAM
BY PATRICK LENCIONI

9/25/2015

#1-ABSENCE OF TRUST



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SIGNS OF LACK OF TRUST

- HOLD GRUDGES
- JUMPING TO CONCLUSIONS ABOUT MOTIVE
- DON'T ASK FOR HELP
- DREAD MEETINGS-DO NOT SPEAK UP

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#2 FEAR OF CONFLICT



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SYMPTOMS OF THE FEAR OF CONFLICT

- BORING MEETINGS
- IGNORE CONTROVERSIAL TOPICS THAT ARE CRITICAL TO TEAM SUCCESS
- POLITICS BEING HANDLED BEHIND THE SCENES
- ADD TEAM MEMBERS TO DO JOB-RATHER THAN HAVE EXISTING TEAM MEMBERS DO THEIR WORK!
- 80/20 WORKLOAD

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#3 LACK OF COMMITMENT



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LACK OF COMMITMENT

- BREEDS LACK OF CONFIDENCE AND FEAR OF FAILURE
 - REVISITS DECISIONS OVER AND OVER
 - ENCOURAGES SECOND-GUESSING
- COMMITMENT PLUS:
- COMMITMENT=CLARITY OF VISION AND THE PROCESS OF BUYING INTO THE GOALS!
 - GREAT TEAMS MAKE CLEAR AND TIMELY DECISIONS

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#4-AVOIDANCE OF ACCOUNTABILITY



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ACCOUNTABILITY

LACK OF ACCOUNTABILITY:

- CREATES RESENTMENT AMONGST THE TEAM
- ENCOURAGES MEDIOCRITY
- MISSES DEADLINES
- CREATES UNDO BURDENS ON LEADERS

ACCOUNTABILITY PLUS:

- TEAM MEMBERS HOLD EACH OTHER ACCOUNTABLE
- TEAM MEMBERS ESTABLISH RESPECT WITHIN THE GROUP
- PURGE SLACKERS

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#5-INATTENTION TO RESULTS

NOT JUST FINANCIAL RESULTS OR CONVERSION RESULTS!

1. WORK AS A TEAM AND MEASURE RESULTS PRODUCED.
2. EVALUATE THE ENVIRONMENT YOU CREATE!
3. THE WORKPLACE IS THE PROFITABILITY!

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A TEAM OF PROFESSIONALS!

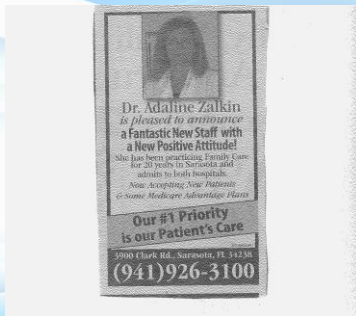


TAKE A LITTLE TEST! TEAM SURVEY!

- DO TEAM MEMBERS ACTUALLY ENJOY COMING TO WORK?
- ARE TEAM MEMBERS SEEKING OUT PLATFORMS FOR COMMUNICATION-OR ONLY GIVING INPUT WHEN ASKED?
- ARE NEW SYSTEMS AND PROCEDURES IMPLEMENTED QUICKLY WITH PROPER TRAINING?
- ARE YOU AS A TEAM MEMBER BEING HANDED GREATER RESPONSIBILITY?
- DO YOU RECOMMEND FRIENDS AND FAMILY TO THE PRACTICE?

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GREAT AD-SARASOTA, FL

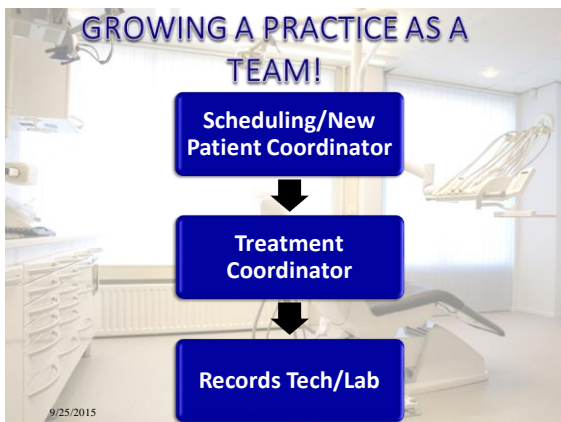


NEXT UPDATE YOUR VISION STATEMENT DUST IT OFF! GET EVERYONE ON BOARD!

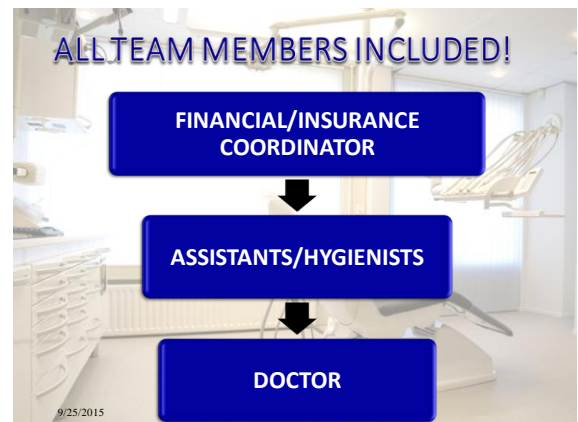
- FINANCIAL GOALS
- TEAM ENVIRONMENT
- PATIENT ENVIRONMENT
- MARKETING/BRANDING
- REPUTATION
- LIFE'S WORK

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GROWING A PRACTICE AS A TEAM!



ALL TEAM MEMBERS INCLUDED!



THE SCHEDULING/NEW PATIENT COORDINATOR



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LET'S GREET EVERY PATIENT

FORGET THE SIGN IN-GREET THE PATIENT!
STAND UP AND COME AROUND THE DESK
TO GREET THE NEW PATIENT!

The New Patient Phone Call!

- "First let me welcome Joey to our practice!"
- Promote office - "Joey will love it here!"
- "Our doctor and team are the best!"
- "Thank-you for choosing an orthodontic specialist!"
- "Thank-you for placing your confidence in our practice."

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The New Patient Phone Call!

- Who may we thank for the referral?
- Have we had the opportunity to serve your friends and family?
- Is this your first visit to an orthodontic office?
- Do you have a time line in mind to begin Max's treatment?

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The New Patient Phone Call!

- Insurance may we check on this for you?
- Is there anyone else in the family who would like to be seen at this time?

I ask that question because I want to make you aware of our family care program. Each additional family member will receive a \$200.00 fee reduction when they begin treatment!

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THE SCREENING OF NEW PATIENT PHONE CALLS!



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SELLING APPOINTMENTS!

- THANK-YOU FOR CALLING DRAKE ORTHODONTICS-THIS IS CHAR HOW MAY I HELP YOU?
- BEFORE I TAKE YOU OUT OF THE COMPUTER LET ME SEE WHEN MY NEXT AVAILABLE APPOINTMENT IS FOR THAT PROCEDURE. I KNOW THE DOCTOR WILL BE CONCERNED THIS WILL DELAY JOEY'S TREATMENT TIME!

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WHEN SELLING THE SCHEDULE USE THE DOCTOR!

- THE DOCTOR HAS ASKED THAT THE EMERGENCIES BE PUT AT THIS TIME
- THE DOCTOR HAS REQUESTED A MID MORNING APPOINTMENT FOR THIS PROCEDURE
- DR. QUO HAS SET ASIDE THIS TIME FOR THIS PROCEDURE
- CLINICAL TEAM MEMBERS DISMISS PROPERLY!!

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THE TREATMENT COORDINATOR



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THE OFFICE TOUR

- THE OFFICE TOUR DEFINES THE VISION OF THE PRACTICE!
- IF YOU ARE EMBARRASSED TO SHOWCASE THE OFFICE-THERE IS A PROBLEM!

THE OFFICE TOUR

- GREET THE NEW PATIENT IN RECEPTION AREA!
- COME AROUND DESK AND INTRODUCE YOURSELF TO THE PATIENT AND PARENT!



THE OFFICE TOUR

- INTRODUCE THE AMENITIES
- CONTESTS
- BULLETIN BOARDS



THE OFFICE TOUR

- BATHROOMS
- IN HOUSE LAB
- STERILIZATION AREA
- DIGITAL X-RAYS
- TOOTH BRUSHING STATIONS

THE OPEN BAY CONCEPT

THE OPEN BAY CONCEPT IS DIFFERENT THAN YOUR GENERAL DENTIST OFFICE.

IT IS DESIGNED TO PROMOTE COMMUNICATION. YOU WILL NOT BE SEATED HERE TODAY BUT WHEN YOU BEGIN TREATMENT THIS IS WHERE YOU WILL BE SEATED!

WE WELCOME OUR PARENTS IN THE BACK TO SHARE IN THE ORTHODONTIC PROCESS WITH THEIR CHILD.

TC INITIAL EXAM FLOW SHEET

What are your chief concerns?

What were the doctor's chief concerns?

Patient: Is there anything you would like to change about your smile (hand mirror)?

What do you think about braces?

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INITIAL EXAM FLOW SHEET

WHO MAY WE THANK FOR THE REFERRAL?

DID DR. SMITH GIVE YOU A CHOICE FOR YOUR ORTHODONTIC CARE?

HOW DID YOU CHOOSE US?

THE REASON WE ASK THIS IS BECAUSE SO MANY OF OUR PATIENTS HAVE PLACED THEIR CONFIDENCE IN OUR DOCTOR AND TEAM AND WE LOVE TO ACKNOWLEDGE THEIR REFERRALS.

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INITIAL EXAM FLOW SHEET

Do any of your friends have braces?

Do any of your friends come here?

Review grade and school; establish network!

Review Health History.

Review "Get-To-Know-You" form.

Review Family Care/Kids Club Enrollment form.

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THE DOCTOR DURING THE EXAM

WHAT DOES A SPECIALTY EXAM LOOK LIKE?

DESCRIBE THE NORMS-DURING THE INTRAORAL EXAM

DOES YOUR EXAM SET YOU APART?

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PROPER FOLLOW-UP FOR WILL CALL BACKS

- SET PROTOCOLS FOR FOLLOW-UP
- DO NOT HARASS THE FAMILY
- SEND AN INVITATION AS A FINAL LETTER TO INVITE THE PATIENTS TO BECOME PART OF THE PRACTICE
- TRACK CONVERSION RATES- A-B-C-D

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RECORDS TECH

- PRE-SELL THE CASE
- CONNECT THE FAMILIES
- BUILD THE NETWORK-FAMILY CARE PROMOTION
- PROMOTE THE DOCTORS END RESULT
- PREPARE THE PATIENT TO BEGIN TX.

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FINANCIAL/INSURANCE COORDINATOR AND CUSTOMER SERVICE!

- COLLECT WHAT WE PRODUCE!
- TRACKING THE FLEX PLANS AND SIBLINGS
- LETTERS TO POTENTIAL PATIENTS-HAVING OBSERVATION READY AND PHASE II READY PATIENTS DEFINED!
- PARTICIPATING WITH INSURANCE COMPANIES- PROS AND CONS!

9/25/2015

HOW TO PROJECT FEE DIFFERENCES TAKING PRIDE

- THE GOAL FOR OUR PRACTICE IS TO PROVIDE QUALITY ORTHODONTICS FOR A FAIR FEE. OUR DOCTOR'S PHILOSOPHY IS NOT TO COMPROMISE IN OUR PATIENTS EXPERIENCE WITHIN THIS PRACTICE. WE STRIVE TO PROVIDE THE HIGHEST LEVEL ORTHODONTIC CARE, INFECTION CONTROL AND TIMELY TREATMENT.
- THANK-YOU FOR CHOOSING AN ORTHODONTIC SPECIALIST!

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WHY CHOOSE AN ORTHODONTIST FOR INVISALIGN?

- DR. D AS AN ORTHODONTIC SPECIALIST IS COMMITTED TO USING THE NEWEST TECHNOLOGY FOR EACH PATIENT HE SERVES. WE PROMOTE THE USE OF INVISALIGN TECHNOLOGY FOR PATIENTS WHO ARE CANDIDATES FOR THIS PROCEDURE.
- WE FOCUS ON A POSITIVE PATIENT EXPERIENCE WITH A QUALITY END RESULT!

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USE A CHARGE SLIP!

- DOCUMENT ANY NO CHARGE PROCEDURES!
- GIVE TO PATIENT AS THEY EXIT THE PRACTICE!
- BE CONSISTENT WITH FEES AND FREEBIES!
- PROMOTE THE GIVE AWAYS!

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**SOMETIMES WE MAKE IT DIFFICULT
FOR OUR PATIENTS TO DO
BUSINESS WITH THE PRACTICE!**



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**NO DOWN PAYMENT?
TRANSFER IN?**



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**CUSTOMER SERVICE!
PROMOTE YOUR IN HOUSE LAB!**



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LAB TEAM

- FAST TRACKING CONVERSIONS
- APPLIANCES THAT DO NOT HAVE TO BE REDONE
- IN-HOUSE REPAIRS
- FLEXIBILITY IN DEBOND TIMES

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PT. FLOW COORDINATOR

- MAKE THE CLINICAL ATMOSPHERE THE MOST POSITIVE EXPERIENCE FOR THE PATIENT!
- TIME AND MONEY-MARKETING 101!
- BRING OUT THE TALENT IN THE TEAM!
- COMMUNICATE WHERE THE CLINICAL TEAM COULD SERVE AT A HIGHER LEVEL!
- YOUR JOB DESIGN IS TO MAKE OUR CLINICAL TEAM LOOK GOOD AND SERVE WELL!

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THE ORTHODONTIC ASSISTANT! 90% OF THE PATIENT EXPERIENCE!

- GREET AND DISMISS!
- COMMUNICATION AT THE CHAIR-A POSITIVE CHANGE.
- USING THE TECHNOLOGY PRESENT!
- CUSTOMER SERVICE- START TALK!
- CUSTOMER SERVICE- PROGRESS REPORT!
- CUSTOMER SERVICE- POST CONSULTATION

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THE START TALK

- PROPS AT THE CHAIR
- VIDEO OR COMPUTER PROGRAM
- CHECKLIST FOR ASSISTANTS
- SEPARATE ROOM FOR PRESENTATION
- PRESENTATION AT THE CHAIR
- SOMETIMES AT THE END-NO EXCITEMENT!
- DOCTOR TO COME BACK AND SAY CONGRATS!

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WHEN SPEAKING TO A PATIENT AT THE CHAIR!

- DO YOU HAVE ANY QUESTIONS ABOUT YOUR TREATMENT?
- WHAT A POSITIVE CHANGE IN YOUR SMILE!
- ONE MINUTE MANAGER
- COMMUNICATE-WHILE SEATED IN FRONT OF PATIENT-NOT TO THE COMPUTER!
- DO NOT STAND OVER THE PATIENT!

9/25/2015

WHEN SERVING A PATIENT

- EXPLAIN THE WHY'S OF TREATMENT
- WHY THIS TYPE OF BRACKET?
- WHY THIS WIRE?
- WHY THIS TYPE OF APPLIANCE?
- WHY THESE ELASTICS?

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WHEN DISMISSING A PATIENT USE THE TECHNOLOGY!

- ALWAYS KEEP PATIENT IN CHAIR UNTIL CHART COMPLETE!
- SCHEDULE WHEN POSSIBLE AT THE CHAIR-IF PARENT IS PRESENT OR PATIENT IS ADULT
- DISMISS PATIENT TO PARENT EXPLAINING WHAT PROCEDURE HAS BEEN COMPLETED
- EXPLAIN THE BENEFIT OF THE TREATMENT AND WHERE THEY ARE AT IN TREATMENT TIME!
- GIVE PRAISE WHEN PATIENT IS FOLLOWING DIRECTIONS

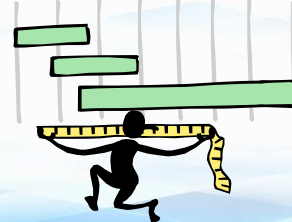
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ALWAYS CHECK FOR FAMILY MEMBERS

- WHEN DISMISSING A PATIENT RESEARCH IF OTHER FAMILY MEMBERS NEED AN APPOINTMENT
- CHECK TO SEE IF KIDS WHO HAVE GRADUATED FROM KIDS CLUB ARE READY TO SCHEDULE
- TALK ABOUT THE FAMILY CARE PROGRAM OFTEN-DISCOUNTS TO FAMILIES!

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PROGRESS REPORTS! A MUST TO KEEP TREATMENT ON TRACK!



HAVE A PROTOCOL FOR PROGRESS REPORTS!

- PROVIDE UPDATE IN WRITING DURING TREATMENT
- STATUS OF TREATMENT TIME
- COOPERATION AND BENEFIT OF COOPERATION PROGRAMS
- ROCK STAR MENTALITY
- PRESENT WITH PARENT IF POSSIBLE.

9/25/2015

SCRIPTING YOUR CARE CALLS!

- HI! THIS IS CHAR FROM DR. SMITH'S OFFICE CALLING TO CHECK ON HOW JOEY IS DOING WITH HIS BRACES. HOW DID THE FIRST DAY AT SCHOOL GO? DOES HE HAVE ANY QUESTIONS CONCERNING HIS NEW APPLIANCES! IT IS GREAT HAVING JOEY BE PART OF OUR TEAM -WE LOOK FORWARD TO SEEING HIM AT HIS NEXT APPOINTMENT!

9/25/2015

CLAIM THE FAMILY AT THE DEBOND

- THE DOCTOR SHOULD KNOW WHO IS IN THE KIDS CLUB
- THE DOCTOR HAS A LIST OF SIBLINGS WHO ARE IN OBSERVATION/PHASE I RETENTION PROGRAM



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MAKING A DIFFERENCE IN DEBONDS



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SURVEY THE CONSUMER THREE KEY QUESTIONS

- 1. IS THE END RESULT WHAT YOU ANTICIPATED.
AGREE OR DISAGREE COMMENTS: _____
- 2. HAS THE EXPERIENCE THROUGHOUT YOUR
ORTHODONTIC TREATMENT MET OR EXCEEDED YOUR
EXPECTATIONS.
AGREE OR DISAGREE COMMENTS: _____
- 3. A REFERRAL FROM OUR PATIENT IS OUR HIGHEST
COMPLIMENT-WOULD YOU BE LIKELY TO REFER FRIENDS
AND FAMILY TO OUR PRACTICE?
AGREE OR DISAGREE COMMENTS: _____

PLEASE TAKE A MOMENT TO GIVE US A REVIEW ONLINE:
GOOGLE.COM, HEALTHGRADES.COM, ANGIES LIST, ETC.

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THE POST CONSULTATION MAKE IT HAPPEN!

WHERE AND WHEN!

LET'S SERVE EVERY PATIENT WELL



9/25/2015

PAY ATTENTION TO THE SMALL STUFF
RETAIN THE NETWORK OF FAMILIES



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KIDS CLUB! REAP THE BENEFITS!
2-7 YEAR OLD SIBLINGS



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THE PATIENT
EXPERIENCE!

SAVE THE SPECIALTY!

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