2009 ortho practice makeover: Oh, what a year it has been!

By Kevin Johnson and Emily Ely

When Dr. Brian Hardy of Hardy Orthodontics won the 2009 Levin Group Total Ortho Success® Practice Makeover, he wasn’t sure exactly what he’d be able to accomplish. What he experienced by year’s end went far beyond his expectations. Let us review Dr. Hardy’s case file for 2009:

Office profile
Locations: 1
Orthodontists: 1
Staff: 3 (a scheduling/insurance coordinator, a treatment coordinator and a clinical assistant)
Treatment Chairs: 3

Orthodontist profile
Age: 36
Dental school: University of Kentucky, 2002
Years in practice: 6
Years in this practice: 2½ (started from scratch in 2006)
Status: married, two children

When Dr. Hardy began his consulting programs, he had four primary concerns.

The economy
Specifically, he was concerned about patients’ continued ability to make a 25 percent down payment on ortho treatment in the midst of a down economy.

The schedule
Dr. Hardy readily admitted his scheduling system was not as disciplined as it should have been. He said he was, “reaching a point where hard and fast scheduling rules need to be implemented.”

A small staff
He wanted to create a professional relations coordinator (PRC) position. He also felt his staff was not large enough for him to delegate responsibilities. Staff members agreed the office was understaffed.

Stress
He reported stress was high in his office. Dr. Hardy felt with the implementation of new and improved systems, the stress level would be much better.

Triumphs, achievements and new possibilities
In his yearlong continuing journey, Dr. Hardy participated in both consulting programs simultaneously, which dramatically enhanced his practice’s ability to increase production— even in 2009’s uncooperative economy. He and his staff were actively involved with us in making critical changes to the management and marketing in the practice.

As with all change, a small level of hesitation was apparent at first. The team, however, quickly stepped up to the plate and began re-building how the practice operated. “Although we were apprehensive about some suggested changes,” said Treatment Coordinator Lee Anne, “our consultants helped us see the benefits and worked with us until we felt comfortable and could ‘own it.’”

Through management consulting, Dr. Hardy and Levin Group Senior Consultant Kevin Johnson worked on several key initiatives for Hardy Orthodontics, including:
- Greenlight Case Presentation™ and PowerScripting™ skills.
- A concerted effort to open consult and treatment start slots to ensure the practice would see as many patients as possible.
- A more efficient approach to collections.

For the marketing portion of his consulting with Levin Group Consultant Emily Ely, Dr. Hardy knew he had to radically invigorate his referral marketing efforts. However, he certainly did not have the time, knowledge or interest to implement or maintain a comprehensive referral marketing program himself. To operate one successfully, Ely worked with Dr. Hardy to create a PRC position that would handle marketing activities efficiently. As a business referral marketing soon took off.

In the latter part of the year, Dr. Hardy was introduced to the critical function of financial planning. In conjunction with Levin Group, RG Capital President Robert Graham provided Dr. Hardy with an in-depth look at current market conditions based on historical trends and pending legislation. Graham emphasized that financial security has two stages: the accumulation phase and distribution phase.

Achieving the most in the accumulation phase requires effective investment strategies that maximize tax and cost efficiencies while minimizing risk. The accumulation phase is crucial to a long, prosperous distribution phase.

“As Dr. Hardy was striving to grow his practice,” Graham said, “I emphasized that he must bring the same energy to rebalancing his portfolio, especially after a period of economic turmoil.”

Financial planning was indeed a timely subject for Dr. Hardy. 2009 had turned out to be an extraordinary production generator.

The end of his first year
As 2009 drew to a close, Levin Group’s Total Ortho Success Consulting Programs enabled Hardy Orthodontics to take great pride in a plethora of remarkable achievements:
- Starts doubled compared to a year ago.
- Production increased 55 percent for the 2009 calendar year.
- Set a record in the practice for the most starts in a single month.
- Experienced a 65 percent production increase in a single quarter.
- Converted 70 percent of his occasional referrers into frequent referrers.

Collections
Dr. Hardy’s production increase in 2009 was astounding. “I just had the best production ever in the worst year imaginable!” he said. “Our Levin Group orthodontic consultants used their expertise to put in the business systems we needed to grow and progress to the next level.

Results like this represent only the beginning of Total Ortho Success. Orthodontists entering years two and three of their consulting experience are well positioned to achieve extraordinary results over the course of their entire careers.

As orthodontic consultants, we experience no greater satisfaction than helping orthodontists like Dr. Hardy discover the potential we knew existed. The Levin Group Total Ortho Success Practice Makeover is a remarkable opportunity for us to help orthodontists realize a practice’s true potential.

Be sure to check the April issue of Ortho Tribune when we begin the journey of Dr. Michelle Gonzalez, winner of the 2010 Levin Group Total Ortho Success Practice Makeover. We will report on Dr. Gonzalez’s practice goals and the challenges that lie ahead.

To operate one successfully, Levin Group orthodontic consultants use their expertise to put in the business systems we needed to grow and progress to the next level.

Levin Group Senior Consultant Kevin Johnson has spent the last eight years working as a Levin Group orthodontic management and marketing consultant. He manages a team of consultants and is a frequent lecturer at the Levin Advanced Learning Institute. Johnson earned his degree from Towson University in 1996.

With many years of marketing experience, Levin Group Consultant Emily Ely joined Levin Group in 2005. Ely uses her unique knowledge and experience to provide marketing solutions for orthodontic practices. She earned her degree in business from Towson University.

Both Ely and Johnson are members of the Ortho Expert Team, a specialized group of consultants who are trained in the needs of orthodontic practices.