Preparing for the Total Ortho Success Practice Makeover

By Jennifer Van Gramins and Cheri Bleyer

The process of practice transformation has begun for Dr. Michelle Gonzalez, a San Rafael, Calif., orthodontist who won the second Levin Group Total Ortho Success Practice Makeover. She and her team are ready to implement Levin Group’s patented management and marketing systems that lead to increased production, starts and referrals while improving efficiency and reducing stress.

“I have an amazing practice,” Gonzalez said. “I feel very fortunate to have won this opportunity to learn how to improve my practice. I love what I do, and I want to be the best I can be.”

For the next 12 months, we will be taking a journey with Gonzalez and her team, guiding them to reach their practice’s full potential. During this yearlong process, Jen Van Gramins will work with the team to incorporate documented management systems throughout the practice. Cheri Bleyer will concentrate on implementing a consistent referral marketing program and devising appropriate strategies.

Participating in both management and marketing consulting programs simultaneously will dramatically enhance the practice’s ability to increase production while reducing stress. Gonzalez and her staff will be actively involved in making the critical management and marketing changes to grow the practice. Throughout 2010, Gonzalez’s progress will be profiled in the pages of Ortho Tribune, allowing readers to get an insider’s view of the consulting process and its positive impact on orthodontic practice success.

As the months go by, we will give you an in-depth look at Gonzalez’s practice. It is the hope of Levin Group and Ortho Tribune that these strategies and ideas that we share with you will inspire you to jumpstart your own practice makeover. Let us introduce you to Dr. Gonzalez and her practice.

Location profile: San Rafael, Calif.
- Type of community: suburban
- Population: 55,602
- Median household income: $69,452

Office profile
- Locations: One
- Location: San Rafael Since 1996
- Orthodontists: One
- Staff: Six — Four full-time, two part-time team members

Levin Group’s patented management and marketing systems, including Power Cell Scheduling™, will go a long way toward reducing unnecessary stress.

Gonzalez’s chief concerns
- The economy: The area has been hit by slowdowns in several employment sectors, though things have improved in the last year. Still, orthodontics is a significant investment for any patient or parent, and a sluggish economy can cause potential patients to postpone treatment.
- The schedule: A more balanced and efficient schedule to create less stressful days.
- Collections: A more effective system that reduces overdue account receivables, which have grown recently in the slower economy.
- Stress: Some days (or parts of days) are extremely stressful. Implementing step-by-step systems, including Power Cell Scheduling™, will go a long way toward reducing unnecessary stress.
- Marketing: Referral marketing is often inconsistent and only occurs at certain times of the year. A structured referral program is crucial to expanding the referral base and increasing production.
- Systems Many of the practice’s major systems are not fully documented in a step-by-step manner. Without clear guidelines, it can be challenging to train new staff.

The staff’s concerns
- The schedule: Developing a more even patient flow is the primary concern for most of the team.
- Communication: During busy times, keeping the entire team on the same page can be challenging.

What’s next for Gonzalez and her team?
Gonzalez’s 12-month program consists of three phases with each phase featuring interactive workshops and private conferences to discuss individual practice issues.

This month, Gonzalez’s office will begin Phase I of her consulting program. Gonzalez’s office will begin Phase I of her consulting program.
- Develop a vision for the practice
- Learn Levin Group’s Power Cell Scheduling
- Identify the goals to achieve during the yearlong program
- Create an Ortho LifeMap™

In our next article, we will document our two-day visit to Dr. Gonzalez’s office. On the first day, we observe a normal day of practice operations to evaluate first-hand the office’s assets and challenges. The second day is devoted to teaching the critical systems and processes that will lay the groundwork for a year of growth and success.

Conclusion
Gonzalez starts her Total Ortho Success Practice Makeover in a great position. She already has a successful practice and a strong team. With Levin Group’s expert management and marketing systems, she is in position to become even more successful.

She opened her practice nearly 15 years ago and has a strong reputation in the community. The next 10 years are prime years for growing her practice, but this period is also a time when many orthodontic practices hit a plateau. Some clinicians rely on the same systems they had when they were starting out.

Unfortunately, as practices mature, systems age and become inundated with inefficiencies. Practice management consulting can help practices avoid the pitfalls of outdated systems and maintain steady growth for years to come.

Gonzalez realizes that she and her team have not tapped into the practice’s full potential. “The foundation is there — we just need guidance and systems in place to take us to the next level so that we can practice more effectively.”

To jumpstart your own Total Success Ortho Practice Makeover, come experience Dr. Roger Levin’s next Total Ortho Success Seminar being held June 17-18 in Las Vegas. Ortho Tribune readers are entitled to a 20 percent courtesy. To receive this courtesy, call (888) 973-0000 and mention “Ortho Tribune” or e-mail customerservice@levingroup.com with “Ortho TribuneCourtesy” in the subject line.

(‘U.S. Census.)

About the authors

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Bleyer joined Levin Group in 2005 as a Levin Group orthodontic management and marketing consultant. As a senior consultant, Bleyer has played a key role in the development of Levin Group’s ever-expanding marketing program, and she regularly lectures at the Levin Advanced Learning Institute.

Van Gramins has spent the last four years working as a Levin Group orthodontic management consultant. Prior to that, she managed medical and dental practices for 12 years. She served as practice manager for Oral Health

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