Makeover: one system at a time

This is the second article in the Levin Group Total Ortho Success Practice Makeover series

By Jennifer Van Gramins and Cheri Bleyer

A practice transformation doesn’t occur overnight. Instead, it’s a series of small steps consistently implemented that yield huge gains in terms of efficiency, referrals and production, while reducing stress and increasing professional satisfaction.

In a few short months, Dr. Michelle Gonzalez and her team have made huge strides in streamlining practice operations, but they realize they still have a ways to go to reach their full practice potential.

“We’ve made some progress... small changes can make a big difference. We are dedicated to making the practice the best it can be,” said Gonzales, the winner of the second Levin Group Total Ortho Success” Practice Makeover.

The consulting experience

Earlier this year, we conducted the first phase of the yearlong consulting program — two days of teaching, breakout sessions and interactive learning, where we met Gonzalez and her experienced team, whose four full-time members are:

• Laurie, RDA
• Irene, RDA
• Mary, financial coordinator
• Kris, scheduling coordinator

Combined, they have 35 years working with Gonzalez, who started the practice in 1993.

“A strong team is a critical asset in moving the practice forward,” said Dr. Roger P. Levin, chairman and CEO of Levin Group. “When your team ‘buys in’ to the consulting process, your practice is poised for extraordinary success.”

During the two-day training, we focused on improved systems and processes in the following areas:

• Scheduling
• Practice communication
• Referral marketing

The schedule has the largest impact on daily operations. A more efficient schedule sets the stage for major practice improvements in the areas of customer service, team stress and morale, and scheduling capacity.

After redesigning their schedules, most practices can increase scheduling capacity, which allows the orthodontist to see more patients and increase production.

Practice communication keeps everyone on the same page. In a busy ortho practice, strong practice communication ensures everyone is working toward the same goals. Miscommunication has negative repercussions for customer service and team stress.

Referral marketing determines the practice’s ability to grow. A structured referral marketing program generates a steady stream of referrals from referring dentists and patients, expands the number of referrals and leads to increased starts and production.

Gonzalez’s practice had been growing for a number of years but had recently experienced a decline in the number of new patients being seen. Focusing on these three areas would put in the missing structure that would allow the practice to start growing again.

Change is under way

Gonzalez and her team have embraced the mantra of practice improvement. In scheduling patients, the practice is now using PowerScripting™ to direct patients to available slots. Previously, patients often would set their own appointment dates, which led to overbooking at times.

In addition, the practice is conducting time studies of its top procedures. This information will be used to devise a more accurate schedule. With the advent of new technologies, Levin Group recommends practices perform procedural time studies every two years.

The team implemented several changes that have resulted in improved communication and customer service. The front desk worked with Ortho II to better utilize the capabilities of its scheduling software. Using “the reason for visit” function has given clinical staff more information about visits by emergency patients.

In addition, the clinical staff is using a written routing slip to keep the front desk team better informed about the patient’s next visit. Previously, the practice relied on verbal communication, which wasn’t as effective.

Gonzalez hired LeAnn as a part-time practice coordinator (what Levin Group calls a professional relations coordinator, or PRC), a position that will handle the practice’s referral marketing activities.

“Having a dedicated staff person will help us more consistently market our practice,” Gonzalez said.

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Conclusion

Gonzalez and her team are on their way to making over the practice. Success starts by revamping current systems, which sets the foundation for greater success. Persistence is paying off for their team.

“We’re excited about what we’ve accomplished, but we’re even more excited by what we can still achieve,” Gonzalez said.

Dr. Michelle Gonzalez, clockwise from bottom left, and her team: Kris, Mary, Laurie and Irene. (Photo/Bruce Cook Photography, San Rafael, Calif.)

Levin Group Total Ortho Success Practice MAKEOVER

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About the authors

Cheri Bleyer, Levin Group senior consultant
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, Levin Group consultant
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 the Oral Health

To celebrate its 15th anniversary, the practice will host an open house this summer for referring dentists and their teams. Strengthening relationships with referring dentists is key to maintaining practice growth.

Leading the practice

With the help of her team, Gonzalez is working to create the practice’s mission and vision statements. These are two critical documents that set the tone and direction of the practice.

A vision statement is about looking ahead three to five years or even farther. A vision statement is not where you are today or even where you will be in the near future. Instead, it is focused on where the practice will be some years down the road.

The mission statement explains the purpose of the practice. While the vision statement is about where the practice will be in the future, the mission statement is focused on where the practice is today. Having and sharing them with the team are key stepping stones for the practice to achieve its goals.

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Gonzalez and her team are on their way to making over the practice. Success starts by revamping current systems, which sets the foundation for greater success. Persistence is paying off for their team.

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