Creating a strong foundation

By Jennifer Van Gramins and Cheri Bleyer

(How is this the third in the Levin Group Total Ortho Success Practice Makeover series.)

Summer is a busy time for ortho practices as more parents opt to start treatment for their children while school is out. In addition, it’s prime vacation time, which means practices are often short-handed as staff members take time off.

In spite of those challenges, Dr. Michelle Gonzalez and her team have been making headway on their practice makeover by documenting and updating systems and implementing consistent marketing strategies.

“I am happy with what we have learned about the practice and the progress we have made so far — but I also realize how much there is for us to do to reach our full potential,” Gonzalez said.

With our guidance, Gonzalez put the finishing touches on the practice’s mission and vision statements. These two documents are crucial steps for guiding the practice to achieve its potential. The mission details where the practice is going for the next three to five years.

Building a buzz

The practice kicked off the summer with an open house celebrating Gonzalez’ 15 years as a practice owner in San Rafael, Calif. More than 60 referring doctors and staff attended the catered event.

“It was the first time we hosted such an event, and it turned out even better than we expected,” Gonzalez said. “We knew it was a great success when people did not want to leave; they were having too much fun.”

Referral marketing is about building relationships, which requires consistent contact with doctors and their teams throughout the year. Hosting an annual or semiannual event is a great way to socialize with colleagues and their teams.

In addition to the open house, the practice has ramped up its referral marketing efforts throughout the summer. Practice Coordinator and Levin Group calls a Professional Relations Coordinator.

LeAnn has been visiting all referring offices, including infrequent referral sources.

Some orthodontists believe it’s a waste of resources to spend time referring to dentists who hardly ever refer. But often when you pay attention to these offices, they will think of your office when it comes time to refer their patients.

Referral marketing to all referral sources in her geographic area, Gonzalez received a referral from a dentist who had stopped referring years ago. This success will continue, as long as the referral marketing program is consistently maintained.

Retooling the schedule

Gonzalez and her team have finished the process of procedural time studies, which is key to constructing an accurate schedule. The schedule serves as the cornerstone for all systemic change in the practice. An inaccurate schedule leads to lost productivity, appointment overruns and increased stress for the team.

“We are trying to create an ideal (optimal) schedule that reflects our current strengths and services,” Gonzalez said.

The practice has installed computers at each operatory chair, making it easy for the clinical team to schedule patients for adjustments and follow-up appointments.

Benchmarking performance

The practice is now using what Levin Group calls Key Practice Expanders—15 critical indicators that measure practice performance, including:

- Production
- Starts
- Collections
- Case acceptance ratio
- Overhead
- Overdue accounts
- No-shows and last-minute cancellations
- Observations
- New patients
- Total referrals
- Number of referral sources
- Referrals per doctor
- Total number of patients referred
- Number of starts per referral source
- Trends in referral patterns

Among the areas the practice is targeting for improvement is case acceptance. Currently, the office sees new patients for an initial exam and records them into a separate consult to review records. Gonzalez and her team are working to streamline this process while still providing optimal service.

The new patient experience plays a critical role in the case acceptance process. In today’s economy, more and more parents are shopping around for the “best deals” on orthodontic treatment. By exceeding patient and parent expectations right from the start through superior customer service, orthodontists and their team can make their practice the No. 1 choice for new patients.

Conclusion

Gonzalez and her team will be heading to the Levin Advanced Learning Institute in Phoenix for Phase II of their consulting experience. During this two-day session, the team will receive advanced training on case presentation, collections and customer service, setting the course for the second half of the practice’s makeover.

To jumpstart your own Total Success Ortho Practice Makeover, come experience Dr. Roger P. Levin’s next Total Ortho Success Seminar being held Dec. 2-3 in Las Vegas. Ortho Tribune readers are entitled to receive a 20 percent courtesy. To receive this courtesy, call (888) 973-0000 and mention “Ortho Tribune” or e-mail customerservice@levingroup.com with “Ortho Tribune Courtesy” in the subject line.

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