Practice makeover update: ongoing transformation

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

By Jennifer Van Gramins and Cheri Bleyer

We made great strides this past year, but our journey is still under way,” said Dr. Michelle Gonzalez, winner of the 2010 Levin Group Total Ortho Success Practice Makeover. The San Rafael, Calif., orthodontist received year-long consulting programs in both orthodontic management and referral marketing.

Gonzalez, the owner and operator of a successful 15-year-old orthodontic practice in an affluent area, entered the contest because she wanted to take her practice to the next level. The systems in the office hadn’t been updated for a number of years, which is typical for many practices. Levin Group recommends redesigning practice systems every three to five years to keep pace with the changes taking place in the office, including the introduction of new technology, new services, new workflow and new personnel.

In addition, team members weren’t always on the same page, which resulted in miscommunication and unnecessary stress. “It can be easy to focus on the day-to-day and lose sight of the big picture, which was starting to happen in my practice,” said Gonzalez.

“The consulting experience really opened my eyes to my practice’s full potential,” Gonzalez said. “No one in the office had an insulated environment,” she said. “A big part of that roadmap was creating a vision statement, which lays out where Gonzalez wants to take her practice in the next three to five years. She set challenging performance targets for the next three years and sees the practice achieving them with the help of her team and improved systems.

Orthodontist leadership

Leading a team can be extremely challenging due to the time constraints placed on orthodontists. As the practice’s main producer, an orthodontist spends most of her or his day providing patient care, which leaves little time for coaching and mentoring the team.

In fact, compared to other dental professionals, orthodontists face far greater demands on their time because of the high volume of patients they see. For example, a GP may see on average 15 to 20 patients a day, whereas an orthodontist can easily see double or triple that number.

Handling that kind of patient volume requires incredible focus, which often leaves little time for team building and training. That’s why Levin Group emphasizes the importance of implementing high-performance systems. When a quality team is in place, the practice almost runs by itself.

During the last phase of her management consulting program, Gonzalez visited the Levin Advanced Learning Institute in Phoenix for two days of intensive and interactive training on leadership. Along with a group of about a dozen other dental professionals who are also Levin Group clients, she learned topics such as:

• Guiding the team
• Enhancing time management
• Improving communication
• Achieving financial independence
• Managing people
• Achieving a vision

This peer-learning experience spurred insightful comments and feedback based on the participants’ diverse backgrounds and leadership styles. Clinicians compare and contrast on what has and hasn’t worked in their practices.

“As an orthodontist and solo practice owner, you often work in an insulated environment,” Gonzalez said. “So it was especially helpful to hear how orthodontists from across the country are dealing with challenges and achieving success.”

Two biggest wins

Gonzalez said the new scheduling system and a structured referral marketing program are the two biggest improvements since the makeover began.

“Previously, our schedule wasn’t functioning at an optimal level. There was some confusion at times between the front office and back office staff regarding the schedule. Now everybody is on the same page,” she said.

The practice conducted procedural time studies — a necessary step to creating an accurate schedule. Computers were installed in treatment rooms, allowing the clinical team to add notes to patient records and schedule the next appointment. In addition, processes were put in place to improve communication between administrative and clinical staff.

“When everybody on the team knows what’s going on, then we all can be focused on providing patients and parents the best possible experience,” the orthodontist said.

In the spring, the practice upgraded its referral marketing efforts. Gonzalez brought on a new employee, LeAnn, as a part-time practice coordinator. “What Levin Group calls a professional relations coordinator) to consistently communicate with the practice’s referral base and potential referrers. The results have been outstanding: stronger referral relationships, the addition of new referring doctors and increased referrals.

“In the past, I would personally do all office visits, but it wasn’t consistent simply because of my busy schedule,” she said. “Having a dedicated employee just makes more sense, and it’s far more effective.”

Final thoughts

“You can always get better,” Gonzalez said. “And sometimes you need help to get better. That’s probably the biggest lesson I learned during this makeover year.”

The San Rafael orthodontist is looking forward to even more success in 2011 and the years ahead.

“My team and I have learned a lot from our consulting experience, and we are ready to keep building on those accomplishments. Full steam ahead!”

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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.

Jen Van Gramins, Levin Group senior consultant

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 the Oral Health

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