

EVOLUTION OF THE
GROWING
ORTHODONTIC
PRACTICE

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THE GROWTH PROCESS

- We See it in Our Offices Every Day
- From Gangly Teens to Young Adults and Beyond
- There Are Growing Pains
- Some Progress Too Quickly/Some Too Slowly

HOW WE GROW

- Toddler - Year 1
- Pre-Teen - Year 2-3
- Adolescent - Year 3-4
- Young Adult - Year 5-6
- Middle Aged - Year 6+
- Maturity – 7 to 10 Years Prior to Retirement

THE TODDLER STAGE THE NEWLY OPENED OFFICE

- The Primary goal is to Get Patients in the Door
- External Marketing with a Capitol

“M”

- Hiring the Right Way
- Getting Good Systems in Place
- At www.mosaicmanagementpro.com, AAO tab

Brochures, Newspaper,
Television
Marketing to the
Community

- What is your Area Demographic?
- How Spread Out is the Community?
- Rural or Cosmopolitan?
- Start out Strong

The Dentist Network
They Need to Know
You

- At Least Two Lunches Per Week
- They Don't Refer to Doctors They Don't Know
- Court the Office Staff
- Fuss Over Their Birthdays

INSURANCES
WHICH ONES TO

CHOOSE?

- Do Your Homework
- Check with Neighboring Employers
- Negotiate Fee Schedules
- Be Selective

HIRING

- Start with One
- Have a Strong Interview Process*
- Strong Cross Training
- It's All about Attitude

*"Hiring and Retention" www.mosaicmanagementpro.com, AAO

THE INITIAL CALL-

SMILE!!!!!!

OUR AMBASSADOR
IMPRESSION

- Smile When You Say That
- Get all the Information Including Insurance
- Check the Insurance before the Exam
- Send Out the Paperwork-Or Send them to the Web
- Create a Bond

SYSTEMS
BEGIN ON THE FIRST
DAY
BE SLICK FROM THE
START

- Solid Systems
- Paperwork or Tablets
- Be Prepared
- Test All the Equipment

WHAT DO WE NEED?

- Don't Sweat the Template
- Get the Exams Right
- Get Good Training on Insurances
- Get the Referral
Maintenance/Letters Going

THE INITIAL EXAM

- Always at No Charge
- Get the “First Half” of the Records
- Start With the Treatment Coordinator
- End With the Treatment Coordinator
- Use an Assumptive Close

INSURANCE FILING

- Be Clear on “Lifetime” and “50%”
- Don’t Miss the Deductible
- Check for Waiting Periods
- Use Phase I and Phase II
- Track Monthly/Quarterly Filing

REFERRAL
MAINTENANCE

- Do the Follow Up

THE OFFICE IS
STARTING TO GROW

THE PRE-TEEN STAGE

CREATE A BASIC TEMPLATE

ZIP UP THE EXAM

- Use a Folder

- Guidelines and Office Description
- Send the Letter Home
- We All Love Our Picture

TIME TO ADD TEAM
MEMBERS

- We Need to Answer the Phones
- Keep the Spirit of the Team
- Maintain Cross Training
- Decide on a Full Time Treatment Coordinator

UTILIZE ALL THE
TOOLS

- Use the Website
- Create the Recall Club
- How do We Confirm?
- Be an Office Cheerleader

ARE WE TRACKING?

- AR -60 Days +
- Insurance Payments
- Recalls/Obs
- The All Important Ratio

BEGIN SYSTEMS

REVIEWS

SYSTEMS REVIEW

- Begin Reviewing the Systems regularly
- Have a Leader for Everything
- Have it in Writing
- Take These Meetings Seriously

THE OFFICE IS
GROWING STEADILY

FULL ADOLESCENCE

RE-WORKING THE
TEMPLATE

MARKET OUTSIDE

THE BOX

GET CREATIVE

- Thanksgiving vs Christmas
- Cinco de Mayo
- Creative Gifting
- Hygiene Partners
- Recall Club

A SENSE OF FUN
NO MORE JELLY
BEANS!

- Be Creative with the Contests
- Personalize the Office-Get the Team Involved
- Upgrade the Dollars

MONITORING
OVERHEAD

ADDITIONAL
STAFFING

JOB DESCRIPTIONS

- Have Specific Job Goals
- Keep Cross Training
- Actively Cultivate the Team
- Meetings, Seminars, Retreats

KEEP THE LEARNING
GOING!

KNOWING AND
GROWING

- Be Sure the Desk Staff has Op Exposure
- Utilize Supply Reps for Training
- Spread the Knowledge with “In House” Training
- Use “Down Time” Wisely

THE OFFICE IS IN
FULL STRIDE

YOUNG ADULTHOOD

STRUCTURING GROWTH

GETTING A HANDLE ON GROWTH

- What's our Philosophy
 - ▣ Three days versus 5 days

- How Do We Keep it “Just Big Enough?”

- How Do We Plan for Substantial Growth?

YET ANOTHER
TEMPLATE

START RE- EVALUATING INSURANCES

RE-EVALUATING INSURANCES

- Is it Time to Let Some Go?
- Do the Research/Track the Overhead
- How Do We Drop Out Gracefully?

IT'S TIME TO REALLY PUSH OURSELVES

- 75%+ Conversion Ratio
- Patient Satisfaction Questionnaire
- Don't Forget the Fun-Start the Defining Party

ADDING MORE INTERNAL MARKETING

- ❑ Games and Contests –Thinking Outside the Box
- ❑ Newsletter
- ❑ Referral Rewards
- ❑ De-Band Hoopla!

RE-VISIT EXTERNAL MARKETING

- Seasonal Gifts
- Lunch and Learns

- Hygiene Partners

THE OFFICE IS
GETTING
COMFORTABLE

MIDDLE AGE

ADDING SPECIALTY TEAM MEMBERS

Is it time for an office manager?

MARKET ANALYSIS

Strengths

Weaknesses

Opportunities

Threats*

- *Paraphrased with liberties from MindTools.com

THE PHYSICAL SPACE STAGE MANAGING THE OFFICE

- Look at it Like a New Patient

- Is it Neat and Tidy?
- How's the Traffic Flow?
- How Do We Personally Present?

MAINTAINING THE
HEALTH OF
TECHNOLOGY AND
TECHNIQUES

GET A

TECHNOLOGICAL REVIEW

- Is it Time for a New Server
- Should We Add New Software
- More Software Training

LIFETIME LEARNING

- In House Training
- Continuing Education
- User Meetings

THE OFFICE IS
WINDING DOWN

MATURITY

WHAT ARE OUR GOALS

- Maturity and beyond
- Time for a face lift?
- Don't let the systems falter now!
- Planning for retirement

TIME FOR A FACE
LIFT?
HOW MANY
WRINKLES DO WE
KEEP?

- Paint, Carpeting and Lighting are Good
- Leave the Hardware Alone
- Consider the Software Carefully
- Digital Never Hurts

MAINTAINING THE
SYSTEMS
DON'T GET
COMPLACENT

- Keep up with Insurance Changes
- You're only as Special as Your Last patient
- An Office is Never Too Good to Market

PLANNING FOR RETIREMENT DON'T FALTER NOW

- Always be Prepared for a Partner or Purchaser
- The Team that Lasts is the Team that Produces
- Numbers Don't Lie
- Patients Always Love the Best
- Continue to Learn

