



ORTHO2

Empowering the Scheduling Coordinator

by **Ken Alexander**

Recently I had the joy of speaking again at the AAO on one of my favorite topics: On-Time, Doctor Time Scheduling. This time was bit different, as instead of looking at scheduling from a clinical and time efficiency standpoint, I was asked to take the scheduling coordinator's point of view. Throughout my career I have watched with admiration as many receptionists battle the patients to get them to take their fair share of appointments during school hours, battle the scheduling template to find enough of a certain code at a time the patients will accept them, and battle the assistants who come up and question "Why did you put this here?" I think that the scheduling coordinator's job has to be one of the most difficult to do well and keep everyone satisfied.

Scheduling coordinators (SCs) are "women of war" as they battle everyone, including the doctor at times. The only weapons they should be carrying are caring, competence, and consistency. The receptionist has to learn to take the hits from others without flinching, and with a smile, offer solutions, instead of the nuclear option of "We can't do that!" No one wants to hear what you can't do for them, however, everyone is open to listening to the solutions that can bridge the needs of the practice with the needs of the busy patient and parent.

The SCs can only do their job effectively if they are empowered to do so by the doctor and team. Empowerment is the authority, ability, and responsibility to take independent action within the policies and systems of the practice to help achieve the practice purpose with on-time scheduling. If an SC does not have some independence in her work to take the system she has been taught and bridge the needs of the practice with the needs of the patient, she is a deer in headlights. If every battle she must go running back to the clinic to find her solutions instead of taking action, the patient loses confidence in her, and she displays poor customer service.

If we are to empower the SC, we must allow her to partner

with the doctor and team. She must be trusted to make the right decisions, and when she screws up, gentle correction is given so she can learn what to do next time. She must know her scheduling system and policies so well that she can make quick and easy decisions as to where she may be able to substitute or even blow a code in order to both keep the practice on time and please the customer. She must also precisely follow the system, or there is no system at all.

Here are some of the most vital ways that the practice can empower SCs and give them the tools they need to regularly win at scheduling without many battles:

The Practice Vision

First, the doctor and team must have a vision for delivering the finest customer service possible while staying on time. It is impossible to be customer friendly when we violate the most fundamental need of the patient and parent to be on time, and offer convenient appointment times. This begins with a vision that no patient will ever walk away from the practice unhappy with us, without at least pouring out our hearts and minds into trying to resolve their needs and upsets.

Develop a Strong Doctor Time Template

I have crisscrossed the globe building doctor time templates, and it astonishes me how many offices think they have one, but in reality the doctor time conflicts in many places throughout the day. A great doctor time template not only juggles the doctor time so that he or she is not needed at more than one place at one time, but it also ensures that there are enough of each type of code available every day to meet the patient needs, see any extra visits, and grow the practice.

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The Doctor and Team Must Empower the Scheduling Coordinator

There are many ways that the doctor and team can help SCs not have patients and parents staring at them in an upset way when the practice is running late, or when they can't get the appointment they want. Here are but a few ways that the SC can be empowered to do her job well:

- The entire team must converge together with one purpose to handle the 3–5 P.M. rush of patients and to stay on time with fabulous customer service and quality work. Those behind desks and in the lab must help with phone calls, seating patients, and sterilization!
- The clinical team must select the right codes, the correct number of weeks, and close out charts immediately. Nothing is more frustrating than not being able to schedule because a chart is left open.
- When a patient's next appointment will be longer than normal, the assistant must prepare the patient that they will be seen during school hours.
- The doctor must not say, "Oh, just drop on by" or "Just call my receptionist and she will squeeze you in." Instead he/she must say, "Can you call one of my expert scheduling coordinators? I am sure she will get you all set with what needs to be done."
- The doctor can empower the SC by giving his vacation schedule at least four months in advance.
- If it is a complicated series of appointments, the assistant should walk the patient to the front and help the SC get the

patient scheduled correctly.

- NEVER tell a patient their next visit is "Just a quick check!"
- If an appointment is taking much longer than planned, please inform the parents who are waiting.
- Assistants who come in early to see comfort visits, work into lunch, and stay past 5 P.M. are much appreciated as a part of our exceptional customer service.

When Only Love Will Do

We live in a world where many people do not experience the true joy of living. It is mandatory we recognize that most difficult people have significant problems in their lives. A gentle word and a kind gesture can be very rewarding in trying situations. Treat your patients with kindness and generosity and they will repay you with their positive comments about you to others. After all, we are in the people business, and it's not about straight teeth, but instead about how we can help others have a better life. ☺

About the Author



Ken Alexander is the Director of Alexander & Sons (formerly Millenium Management Services) for the past 30 years and is one of the most highly respected orthodontic consultants in the world. He is the CEO of a mega-practice and lectures regularly throughout the USA and Europe.