

# Value of Cross Training

Blend strength, skills, and capabilities

When a goose flaps its wings it creates uplift for the birds that follow. By flying in a "V" formation the flock has 71% greater flying range than if each bird flew alone. When the lead goose tires it moves back and another goose flies to the point position. The geese flying in formation honk to encourage the birds in front of them to keep up their speed. Geese instinctively know how to fly together to blend strength, skills, and capabilities. When a goose becomes sick or leaves the formation the remaining geese immediately take over without interruption.

What can we learn from the lessons of the geese? What happens when a key employee is out of the office, expectedly or unexpectedly? Does your team fall apart? Does it cause an interruption in your patients' care? Do your team members "honk" politely to give positive encouragement to employees who might be falling behind or need additional assistance?

With the change in the economy we are seeing more practices transition to a trimmer and leaner philosophy. The value of cross training has increased as we find ways to become more efficient, yet continue to deliver ongoing exceptional patient care.

## Where to Start

Introduce the concept of cross training in your orientation for new employees. Create a detailed job description for each position including procedure documentation, timelines for daily, weekly, and monthly duties, and written materials and training tools that are available as references (Ortho2 and other software documentation, front office or clinical training manuals, appliance diagrams, etc.).

Utilize morning huddles and team meetings to strategize what responsibilities will be cross trained, evaluating what will have the greatest immediate and long term positive impact to the practice and the team member. Set up a 12 month schedule outlining the topics that will be cross trained on a monthly basis. Set aside a two-hour lunch or a block of non-doctor time monthly to conduct your Ortho Cross Training University (OCTU.)

by **Debbie Best**

Assign a team member as the OCTU Instructor for each training session, depending on their area of expertise (e.g., camera technique: records coordinator, sterilization: sterilization assistant, scheduling: scheduling coordinator).

## Areas to Cross Train

Train every employee to **sterilize instruments**. Not only can they step in to help as needed, it also gives all team members the confidence to educate patients and parents regarding your sterilization process. Encourage team members to be current with a Hepatitis vaccination, even if their primary position in the practice is administrative. Develop a manual outlining the sterilization process, complete with pictures of all of the instruments used and safety guidelines. If the sterilization process includes putting together tray setups, take a photograph of each completed tray along with a list of instruments needed for each setup.

Train all team members how to **clean up the chair** after a patient is dismissed. Create a checklist of the necessary steps to clean a chair and prepare for the next patient:

- How can you tell if a chair is clean?
- How do you spray, wipe, and cover the unit?
- What disposables are replaced?
- Where are the disposables stored?
- What do you do with sensitive items (burs, hand pieces, etc?)

This will add an immediate positive impact to your patient flow, especially during before and after school congestion.

Establish your protocol for **seating a patient**. Develop a checklist covering information that is discussed before the clinical assistant and/or doctor comes to the chair:

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- ☑ Do they need to brush their teeth before their appointment?
- ☑ How are they doing with their appliances?
- ☑ Do they need any supplies (toothbrush, floss, wax, etc.)?
- ☑ Do they have any questions regarding today's appointment?

The team member who seats the patient will stay with the patient until the clinical assistant is available to start the scheduled procedure.

Train all employees on how to give **hygiene and appliance instructions**. The administrative team is often asked questions by a patient or parent regarding appliances, elastic wear, or oral hygiene, and when they are comfortable answering questions it reduces or eliminates the need to interrupt the clinic. Having all team members well versed on the parts of appliances, how they work, common concerns, patient cooperation required, and the answers to frequently asked questions will help ensure that patients are receiving correct information at all times. Checklists are particularly helpful so all important information is covered. Also be sure each team member has access to Edge Animations, particularly any animations you have customized for your patients.

With the wave of technology and computers at every chair we are seeing more scheduling done by the clinical team. Even if you are scheduling appointments at the front desk, all team members should be trained to **schedule patient appointments**. Not only can the clinical team help out by answering the telephone and scheduling appointments, it also allows for the flexibility of having a clinical team member work on non-patient days to schedule appointments. Having the clinical team schedule appointments also gives them a little more control over their daily schedule. They can make adjustments to the schedule dependent on special circumstances or 'prize patients' (patients you want to give away).

Train all employees how to **post a payment** and generate a computerized receipt. Set up a solid protocol outlining the specific steps to post payments along with the checks and balances to ensure that it is done correctly. Should employees run into problems, having a list of common questions and answers is helpful. To maintain the integrity of the daily financial audit,

employees must be signed into the ViewPoint or Edge under their own name and password before they post any transaction.

Training all employees to use the software to **generate reports** allows team members to actively track patients through treatment. Educate all employees on the purpose and value of each report and document the steps needed to generate the information. Having all employees monitor patient reports reduces the possibility of patients falling through the cracks.

## Make it Happen

Cross training does not happen through osmosis. Create your vision of cross training as a team exercise. Where do you want to start that would generate an immediate and valuable outcome? Set aside non-patient time and develop lesson plans for structured training and role playing, including a test or quiz at the completion of each session. Review the effectiveness of the cross training, remembering that team members require ongoing practice to stay current with their new skills.

Take the lesson that the geese have taught us and implement cross training to ensure high quality, uninterrupted care to your patients. As with geese, employees have greater potential working as a team than by flying on their own. Next time you look up in the sky and see geese flying in formation, ask yourself, "Do our employees work together as an uninterrupted team, confident that our team has been trained to assist or take over if there is a break or change in formation?" If your team is flying out of formation, take the first step to cross training today, confident that in 6 months your team can be flying in a V formation, as strong as the geese used as their role model. ☺

## About the Author



Debbie Best, practice management consultant and lecturer for Consulting Network, has over 35 years of experience in the dental and orthodontic field. Debbie focuses on practice productivity, financial controls, and practice building.