



ORTHO2

Empowering Your Team

With Leadership Skills

“It is ultimately leadership character that determines our opportunity for influence and impact.” – Mark Miller

After recently attending another well-organized and structured Ortho2 Users Group Meeting in Savannah, I was intrigued by how much work and planning goes into this once a year event. These large events take strategic planning and reliance on key personnel who have the qualities to lead others in making things happen.

Our orthodontic practices and the team members we work with are no different. With a new year upon us and new goals to aim for, it's a perfect time to empower your team to invest more of their time, energy, and skills developing leadership qualities. Not only does this take all the pressure off of the business owner, practice manager, etc., it also elevates your team to contribute at a new level and enhance their role and professional accolades.

It is amazing to see a team get excited about their qualities being highlighted and promoted as their roles and responsibilities get elevated with new job titles and leadership tasks. Both in my working role as a TC/MC in an Ortho2 practice (Dr. Don Wilson, Novato, CA) and in my role as a consultant working with other practices, we are seeing positive results with the time dedicated to creating leaders and committees to help run the day-to-day efficiency and effectiveness of a well-run orthodontic practice.

We have kicked off the new year by evaluating team members' duties along with their strengths and given out new titles in a leadership format. This is then supported and highlighted with new name tags/name plates, listed on our website, Facebook page, office photo wall of our Meet Our Team, and shared on our reception room digital monitor – Kaleidoscope.

Choose your specific team leaders and spend 1-2 hours with them discussing leadership roles and the goals for the area they will be overseeing with their selected

by **Carol Eaton**

committees. Check out SimpleTruths.com and purchase a book on leadership to share with the committee leaders. One of my favorites is “The Heart of Leadership: Becoming a Leader People Want to Follow” by Mark Miller. Then have your committee leader choose and meet with their team members and plan their goals for what they want to accomplish during the year.

Basic Leadership Skills according to Mark Miller:

- People skills
- Execution skills
- Knowledge of industry trends
- Ability to articulate a vision
- Be competent

Each committee should meet on their own monthly (more often based on needs and experience of team members), and then report updates at the quarterly or every-other-month team meeting updating all team members on their progress and status.

Here are some ideas as you develop your team committees and committee team leaders:

1. Scheduling Committee Team Leader – Lead Front Desk Business Coordinator/Manager
 - Oversees and works with other front desk team members on the scheduling grids
 - Creates the scheduling calendar for the next 12-18 months coordinated with doctor time out, administrative days, school holidays/events, production days, holiday schedules, summer schedules, etc.
 - Provide a concierge feeling at your front desk by training all front desk team members in consistent,

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friendly, high-energy patient/parent greetings and positive closing comments as the patient/parent departs from your office

- Listen, monitor, and teach enhanced verbal skills that are positive, proactive, and promotional
- Give feedback and training tools on how best to deal with difficult people
- Coordinate the quarterly parent appreciation contest
- Update the reception room guessing contests with creative ideas and themes for patients
- Oversee and maintain a clean beverage bar in your reception area

2. Financial/Insurance Team Leader – Financial Coordinator/ Insurance Coordinator

- Work on a smooth, efficient way of checking insurance benefits, ideally prior to the initial consultation
- Create a protocol for filing insurance claims that avoid delays in getting payment
- Monitor A/R reports to keep a healthy balance of paid in full, and short/long payment plans within your desired outcome
- Stay on top of collections and work on maintaining healthy relationships when renegotiating difficult accounts
- Look at creative ways to make money issues flow smoothly in the practice by using tools that enhance both treatment and financial options e.g. AccepTxPro, OrthoBanc, OrthoFi

3. New Patient Process Committee Team Leader – Lead Treatment Coordinator

- Work on a smooth transition with the new patient process: The NP phone call, welcome email/reference to website, personal confirmation call, initial greeting, diagnostic records, pre-sell part of the exam, closing TC skills
- Create a solid pending protocol for ongoing follow-up with patients not yet committed to your practice
- Train all TCs and backup TCs in enhanced verbal skills for selling your practice, your doctor, and team
- Stay in good communication and contact with your peers including GPs/specialists
- Find creative ways to increase NP phone calls
- Work with the Marketing Committee to brainstorm suggestions for marketing to the new patient
- Review quarterly referral reports; focus on top 10 each year

4. Clinical Committee Team Leader – Clinical Coordinator

- Review the scheduling grid and work with the front desk on smooth patient flow
- Meet with clinical team members to provide updated information on clinical procedures, efficiency, and cross-training including scheduling patients chairside
- Brainstorm ideas for fun and motivational marketing with existing patients
- Support and encourage patients to get involved with social media contests
- Provide patient education for orthodontic patients on compliance, oral hygiene, elastics, etc.
- Talk up patient referral programs inviting patients to invite their friends to your practice

5. Marketing Committee Team Leader – Marketing Coordinator

- Research community events that your practice can be involved with and support
- Develop a marketing program to local schools
- Support your local sports team during the year, sponsor teams, etc.
- Oversee marketing calendar; work within yearly budget
- Look at new opportunities to provide support to dental peers: CE programs, CPR classes, RDH appreciation events, etc.
- Get involved with either Smile for a Lifetime or Smiles Change Lives scholarship programs

6. Social Media/Communications Team Leader – SM/IT Coordinator

- Keep updated content on your website
- Post regular Facebook photos and events about your team and the practice
- Manage Yelp/Google Reviews; ask for more reviews
- Host online social media contests for your patients/parents

About the Author



Carol Eaton is best known for her expertise in training treatment coordinators and streamlining the new patient process. She also focuses on enhanced communications, internal/external marketing, team building, and presenting your practice message in a fun and professional format.