



ORTHO2

# The 9 Topics Every Ortho Practice Must Address

Running a successful ortho practice is a complex enterprise that requires careful coordination and proficiencies beyond the science of orthodontics. Practice owners must manage their offices adeptly, especially in the new dental economy where competition for patients has intensified and ortho shopping is commonplace.

When a practice doesn't run as smoothly as it should, what improvements should be made first? Levin Group has identified 9 Areas of Expertise that, when effectively handled, will result in more referrals, more new patients, higher production, and less stress.

## 1. Production

Establishing – and meeting – a target of 15% growth in production every 12 months will keep ortho practices on the path to success. Anything less than 15% serves as a warning that the practice might be headed for a plateau or, worse, a decline. Fortunately, ortho production can be consistently increased without working more hours. Here's how:

- Develop systems to bring in more new patient referrals from both doctors and current patients.
- Lay the foundation for additional future production by executing a solid observation program.
- Build higher levels of production into the day with more efficient scheduling.

## 2. Collections

Controlling practice finances and collecting 99% of fees owed will protect the bottom line as production increases. To reach the collections target and keep profits up, orthodontists can implement the following measures:

- Help make treatment more affordable, and encourage on-time payments, by offering financing options to every family. These should include smaller deposits to begin treatment and financing through a reputable outside company.

by **Dr. Roger P. Levin**

- Limit office overhead to 49% by regularly analyzing expenses and looking for ways to cut costs.
- Make sure the practice's fee structure is competitive but that it also maintains profitability.

## 3. Team Building

For most orthodontists, managing a team can seem more daunting than even the most difficult clinical procedures. Workforce administration isn't part of the curriculum in most dental schools, yet practice owners find themselves hiring, supervising, and coaching a multi-person staff. By making team building a focus and following a few guidelines, doctors can eliminate many personnel issues and solve the conflicts that inevitably arise:

- Create a cooperative atmosphere with a practice vision statement of where the practice will be in 3–5 years. This provides a common goal for the entire team and serves as a unifying influence.
- Promote collaboration through efficient team meetings. Each morning, the Daily Business Meeting™ informs everyone what to expect that day. The Monthly Business Review™ gives the orthodontist and staff the opportunity to train together and address more complex questions.
- Provide team members with written job descriptions, annual performance reviews, and a regular training schedule so they can meet and exceed expectations.

## 4. Scripting

Scripts help all team members, including the doctor, become adept at influencing patients and parents, whether in a case presentation, on the phone, or in the chair. Scripts are not meant to be recited, but instead translated into each person's own words. The guidelines

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below will help ensure that scripting is successful in the ortho practice:

- Scripts should be practiced through role-playing so that they become second nature.
- Every patient and parent interaction should be scripted so that team members:
  - Ask for more word-of-mouth referrals.
  - Close more case presentations.
  - Reduce no-shows and cancellations by emphasizing the value of each appointment.
  - Build strong relationships with every family.

## 5. Case Acceptance

In today's dental economy, ortho practices need to maximize both time and effort. That includes closing 90% of all cases by emphasizing what parents are buying: a beautiful smile for their child. Treatment coordinators and doctors can turn more "maybes" into "yeses" by:

- Scripting the entire case presentation from start to finish, keeping the doctor's time in the room to a minimum.
- Emphasizing lifestyle benefits (the smile) rather than clinical details.
- Expecting and skillfully handling questions and objections.

## 6. Scheduling

An ortho practice's scheduling system can make or break the entire day. It manages patients, staff members, and the doctor to expand production and minimize chaos. To keep each day running as smoothly as possible:

- Conduct time studies on the most common procedures performed at the practice to ensure that the schedule allows enough time, but not too much, for each appointment.
- Use 10-minute increments to build the schedule, rather than 15.
- Set aside time for new patients so that they can be scheduled within 7–10 days, and know where emergencies might be fit into each day.

## 7. New Patient Experience

The New Patient Experience begins with the very first phone call to the ortho practice. It encompasses the consultation, the tour, and the first appointment as well. Throughout the process, parents and patients continually consider whether they want to join the practice – or not. Here's how ortho teams can provide WOW customer service to prospective families:

- The front desk staff must be prepared with proper scripting so they can appoint 98% of prospective patients who call. To do this well, team members need to have the scheduling

system at their fingertips, get to know the caller a bit, and impart information about the orthodontist and practice.

- During the consultation, the treatment coordinator needs to welcome new families like VIPs and get to know them while presenting the case for treatment.

## 8. Treatment Coordinator

Hiring a treatment coordinator and training her to sell ortho treatment successfully will help make a 90% case acceptance rate possible and improve the ortho practice's ability to establish relationships with families. Her job description should include the following:

- Practicing the "golden 10" with patients and parents by learning 10 personal facts about them. This technique gets them talking and feeling comfortable.
- Answering any objections or questions that may be raised in the case presentation.
- Mastering a script that covers the entire case for treatment, including financial options and insurance information.

## 9. Marketing

Marketing is the one area that requires ortho team members to turn their attention outside the practice. Without a steady stream of new patients, future production and revenue are at risk. Referrals should be coming in from at least two sources – general and pediatric dentists in the area and current families. Here's how to keep the patient base growing:

- Hire a part-time marketing coordinator to brainstorm, organize, and track outreach methods.
- Implement approximately 15 ongoing, consistent marketing strategies, including sponsoring community events, targeting new pediatric and family dentists in the area, displaying signage letting current patients know that referrals are appreciated, and more.
- Set a target of receiving referrals from 40–60% of current parents and patients each year.
- Establish your practice as the top choice for orthodontic care in the area.

Together, these 9 Areas of Expertise reach into every aspect of ortho practice operations. As they are mastered one by one, orthodontists will see profits increase, their patient base grow, and stress levels fall. Not only will the office become a more pleasant place for both patients and team members, but it will also be prepared to prosper in any economy. ♡

# About the Author

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To learn more about how to grow your ortho practice, attend Dr. Roger P. Levin's "Building The Superior Ortho Practice" seminar on June 19 in Newport Beach, CA. Ask your Ortho2 Systems Consultant how you can receive an educational grant to attend the seminar free.