

GLOBAL TEAM SOLUTIONS
PRESENTS



OFFICE MANAGEMENT GEMS!

THE PEARLS VOL. 6

Denise Ciardello
Janice Janssen
Christopher Ciardello
Cindy Day Hauk

Office Management Gems! – The Pearls Vol. 6

Copyright © 2017 by Global Team Solutions, LLC

All rights reserved. No part of this book may be reproduced or transmitted in any form or by any means without written permission from the author.

ISBN 978-0-9849977-7-0

Printed in USA by 48HrBooks (www.48HrBooks.com)



Global Team Solutions

Practice Management Gurus
Solutions that Work

Table of Contents

Introduction	4
Chapter 1	5
Chapter 2	12
Chapter 3	19
Chapter 4	25
Chapter 5	30
Chapter 6	37
Chapter 7	44
Chapter 8	50
Chapter 9	58
Chapter 10	64
Chapter 11	70
Chapter 12	77
About the Authors	87
Products	91

Forward

Many of our articles appear in our monthly newsletter. Following is an email we received from a valued OM / colleague in response to our December 2016 newsletter. - Thank you Judy!

"My life is really not much different than most. However, there are many times when I feel like the weight of the world is in my face and riding my shoulders. Your newsletter is not really for somebody like me, because I, like you, am the one that offices call in to fix whatever needs fixing. So, I don't need somebody else preaching to the choir. Or do I???"

The answer is yes, I do. I loved the Black Friday story and the She Cancelled Again? story. Reading the articles made me stop and think about why I love dentistry and all the chaos that goes with it.

When you (GTS) started your newsletter, you geared it for new, fresh, young, and slightly seasoned dental people. You also geared it to the doctors and very seasoned dental people to reinforce what they were too hesitant, indecisive or stubborn to implement.

The added bonus from the newsletter was people like me, and like you, that sometimes need to hear what we already know but needed to hear it again to remind us why we do what we do. So, thanks!!! I needed the newsletter to come out of my funk!!!"

- Judy Loggins

Chapter One

Adjustments

By: Janice Janssen, RDH, CFE

Oh, the weather outside is frightful...Oh no wait! That's the amount of adjustments made in my practice this year. Yikes! How did that happen? Many offices are surprised at the magnitude of their adjustments throughout the year; and as the year is coming to a close, that Year-To-Date number is even more frightening.

We are often asked what is the appropriate ratio of adjustments to the practice's production numbers. Unfortunately, this is not an easy question to answer. There are many different facets that need to be considered:

- Are you participating with any PPO insurance companies? If you are, then how are you charging the patient? There are a couple of different ways this can be done:



- Some offices will charge the patient their full fee and then make the adjustment when the Explanation of Benefits comes in from the insurance company. This will yield a higher % of adjustments to your production and the number increases with the amount of PPO insurance companies your office has contracted.

- Other offices will charge the patient the PPO contracted fee. With this method, there are fewer adjustments so your % will be lower. Many practice management software will allow you to charge the PPO fee on the patient's account while sending your practice's usual and customary fee to the insurance company. This is the method we prefer because there are not so many adjustments to sort through to ensure accuracy. As a bonus, you have more accurate production numbers to look at throughout your month. This gives you a much better idea of what you should collect.
- Do you offer any new patient specials? In-office dental savings plans? Free whitening? If you are offering these specials, how are you handling the benefit in your practice management software? If you are creating an adjustment (or write-off) then your numbers are going to be higher than the offices that do not have these offers. It is not a bad thing; it is just something to be considered when looking at your % of adjustments.
- We have also found some offices with a new team member that has decided to "clean-up" the patient accounts. Let me explain: Some family accounts have a \$0 balance, but Dad has a credit of -\$200 and Johnny has a +\$200 balance. The admin team applies a credit adjustment to Dad and a debit adjustment to Johnny to create a \$0 balance on both accounts. This is a perfectly acceptable practice; however, it does make your adjustment numbers look completely out of order. If this is occurring in your practice you should:

- First, create two adjustment types named something like “Family Acct Offset”; one should be a debit and the other a credit.
- When looking at these numbers, they should balance. If the +Family Acct Offset is \$100,000—the –Family Acct Offset should be \$100,000.
- The practice should only use these two adjustment types to “clean-up” the patient accounts. This will reduce the confusion when determining true adjustments in your practice.



The #1 thing that we preach is that if you are making an adjustment to any account—you are required to put a note in the adjustment explaining why it is necessary, along with the initials of the individual creating it. We must remember that creating an adjustment is actually taking money out of the practice’s bank account. The money will never be collected once it is written off so it is money out of the bank. Whoever is creating that adjustment needs to have the authorization to do so, and should include who gave them the authority in their note.

As a Certified Fraud Examiner, it is my humble opinion that you should have as few adjustments as necessary. There are always going to be adjustments to be considered, but the more there are, the harder it is to determine which are legitimate or not. Keeping them to a minimum is the best practice. We see so many abuses of the adjustments that we are very passionate about how they are maintained.



"It was a great meeting. Janice is very fun and since she's been in the dental field for so long she is really very knowledgeable. "

- E. Hanna -

"I raved about you to our office & we are so excited to implement some of your plans! Thanks so much for the class it was great!"

- M. Morgan -

"As usual you are awesome, your spot on. Thank you."

- T. Jorgensen -

Ending the Year with a Bang

By: Christopher Ciardello

Happy New Year! The New Year is sure to bring about new adventures around every corner, however, before we focus on 2016, let's properly put 2015 to rest. This will include taking the steps to make sure that you have crossed all your "i's" and dotted all your "t's"? Before you know it, tax season will be upon us, so let's get ready for it now.

First thing to do is make sure that all clinical notes were signed, charts have been audited, insurance claims have been submitted and all adjustments have been posted. This is



important because we need to know what our final production and collection numbers are for the past year. We can then close out the month of December to lock in those numbers.

Next you will reconcile your practice management software with your bank statement. Although we highly recommend that this be performed on a monthly or even a daily basis, we know that some prefer to wait until the end of the year. As part of your 'checks and balances', the rule of thumb is: whoever is reconciling the day sheet should not be the same person that is taking the deposit to bank on a daily basis. The final year-end reconciliation should follow the same rule.

Once you have reconciled your accounts, it will be time to contact your accountant. This is probably someone outside of the office who works on your numbers monthly. While we often see

accounting reports coming from a brother-in-law or other family member, it is recommended to rely on the expertise of a certified public accountant (CPA) to do your taxes for a few reasons:

1. There can be many deductions and advantages when owning a business that your accountant will know to ask you about. This will ensure that you take advantage of all the benefits allowed to you and help you pay at the lowest tax rate.
2. In the unfortunate event of an audit, a CPA can guide you and even represent you as an expert. It may be more expensive to go with a licensed accountant, but my parents always told me growing up “The cheap often turns out expensive.” Pay that extra money now to save you a headache later.

By getting all your year-end numbers together, you can step back and see the big picture of how much you spent on supplies, continuing education, meals, payroll and overall operating expenses. Basically, it allows you to put your thumb on the pulse of your practice. This is a great time to compare your numbers to the national averages to determine if you are within the industry standards. This information will, then, allow you to project for purchasing equipment, raises and CE trips for the upcoming year. If you are interested in an annual planning session to help decipher all this information, please email us at: info@GTSgurus.com to schedule a time. This is the best New Year’s Resolution that you can do for your business.

Finally, it’s time to do some spring-cleaning. Get a box, or for some it may be an external hard-drive. Put all the paperwork (receipts, invoices, EOBs, bank statements, employee records,

etc.) that pertain to the previous year & place it in this storage location. Find a secure spot to store all these important documents and keep in mind that you will want it to be easily accessible for any future inquiries.

This is a great way to start the year. Your desk will have plenty of new space to put your documents for the New Year. Plus, it just feels good to clear out some space.



"I'm blown away with the amount of great practical ideas you bring to us. Thank you for making our jobs more efficient."

- C. Bonafede -

"I always come away with great ideas to help improve my performance and help my practice!"

- P. Erickson -

Chapter Two

Do you Have a Bully?

By: Denise Ciardello

Bullying. We hear so much about it in the news today. It's no longer the mean boys that beat-up kids for their lunch money or even the mean girls that don't invite other girls to the mall. Now we have cyber bullying that



has kids putting vile, vicious comments about other kids on social media sites. The word spreads like wildfire through all the 'hangout' channels. It has such a negative effect on young impressionable minds, which has forced kids to change schools, drop out of school altogether, and in some very sad cases even led to death.

Bullying, unfortunately, is not limited to kids. We see many adult bullies. I don't know if adult bullies were bullies as children or if being bullied as a child caused them to grow up to be bullies, however, it seems to be getting worse in the workplace. It takes on all shapes and sizes and has an adverse effect on any practice.

What is bullying? Forms of bullying that we see include:

- The employee that is always right and never allows anyone to change a system, even though his or her way is quite antiquated.

- Passive aggressive behavior that causes everyone to constantly look over their shoulder for the sabotage that will make them look bad, wrong or unethical.
- Yelling, screaming, demeaning, constantly correcting/monitoring or outright demoralizing others.
- Single one person out of the pack to 'pick on'.

The workplace becomes a hostile environment with a decrease in production due to the employees trying to avoid the bully or the inefficient systems that prevent growth in the company. A bully can select



one person or can bully the entire team. The need to control a person or an environment seems to be the target of a bully. The methods that a bully takes are akin to that of a domestic abuser – picking the time, place or circumstance to be caring or kind and when to inflict pain; all of which is emotionally abusive.

Do you have a Bully?

How do you know if there is bullying going on in your office?

- Is there one person that everyone, or many people, avoid?
- Do you have someone that has suddenly become isolated?
- Have you been told by an employee that they are being bullied?
- Is there a decrease in production?
- Do you hear verbal abuse or demeaning from one employee to another?

How to handle a bully?

The best thing to do is to address the situation. If you are the one being bullied, you will want to speak to the bully personally. This is probably the most difficult step. However, by looking that person in the eye, and stating your feelings, you are defining how you expect to be treated. You must stand up for yourself. You will want to remain professional and just

like with any conflict resolution, keep your comments concise and with the use of 'I' statements. Accusatory statements only add fuel to the fire and reduce the chances of your desired outcome. If the belittling continues, it is time to climb the chain of command, taking your concerns to the manager or boss. If the bully is your manager or boss and you do not receive any satisfaction by bringing the situation to light, possibly it is time to take your skills elsewhere. Your mental health is not worth remaining in a hostile environment.



If you are the employer and suspect or have been told there is bullying occurring in your office, you will want to address it immediately. Unfortunately, many times the person being bullied is a more valuable employee than the bully, yet chooses to terminate employment. This is a lose-lose for the practice because the bully will simply find another target. And the cycle continues.

Using words like personality conflict or difficult person softens the disruptive behavior without truly defining the behavior. Tom Engelhardt said it wisely when he said, "Words denied mean

analyses not offered, things not grasped, surprise not registered, strangeness not taken in, all of which means that terrible mistakes are repeated, wounding ways of acting in the world never seriously reconsidered. The words' absence chains you to the present, to what's accepted and acceptable."

Call this what it is: **Bullying**. It should never be allowed or tolerated. Create a zero-tolerance zone and have an open-door policy to allow victims an option for discussing the problem. A bully can be a cancer in your office that eats away at the productivity of your practice and the morale of your team. Growth will be stunted and lead to constant employee turnover. Take a good hard look at the behavior of all employees. Is there a problem that needs to be addressed?

Published in DIQ May 31, 2016



Tick Tock, Time is Money

By: Cindy Day Hawk

Your patient has a broken tooth that may need a root canal, a crown, and a buildup. You hand them a treatment plan to give them an estimate of how much it is going to cost them. The patient has insurance and it has been a practice in your office to pre-authorize everything! So, you tell the patient, we are going to send this off to the insurance company. As soon as we receive the preauthorization, we will call you and schedule an appointment. You wish them a nice day and off goes your patient, with a broken tooth that now may turn into something more serious or more expensive. Why? Because we feel like we HAVE to send a pre-authorization to find out how much the insurance is going to pay. And how long do we normally wait for those pre-authorizations? Two weeks to four weeks or longer, IF you don't have to resubmit more information. Tick Tock, Tick Tock, time is money! Have your ducks in a row and make sure when you do send in your claim that you have provided the insurance all the information they will need to process for payment in a timely manner.



If you are utilizing fee schedules in your software, and you are entering in the insurance information correctly, you should already have a good idea of what the insurance is going to cover. You just let that patient walk out the door without knowing when they were going to get their tooth fixed. When you call an insurance company, what is the same thing you hear every time you call? "This is not a guarantee of benefits." Same disclaimer, same excuse, same delays. If the insurance does not require a pre-

authorization, then why would you send away a patient who needs and is willing to receive treatment?

There are a few things we already know:

- The maximum
- The deductible
- Any benefits used
- Have they met their deductible?

Based on the information the patient's insurance company has given you, and utilizing the fee schedules and coverage tables in your practice management software, you have the information you need to provide the patient an estimate of costs they will incur.

Ideally you have financial arrangements that your patient signs that will let them know they would be responsible for any remaining balance their insurance does not pay. Pre-authorizations, if not required, take time, and even when you do receive them, they are not always correct due to any treatment that may have been performed in the process. Once again, "this is not a guarantee of benefits".

Have a good policy in place of how the insurance information is entered and what insurance information you need to provide your patients with the nearest estimate possible. Always have a policy in place for the patient to sign in case insurance does not pay. This will keep your practice productive and more efficient in caring for your patients. To learn more about becoming a more productive office call the Gurus at Global Team Solutions!



*"Excellent seminar for promoting positive change
in insurance billing."*

- T. Stanfield -

Chapter Three

Reports to Maximize Your Practice's Productivity

By: Denise Ciardello

“What reports should I be looking at daily, weekly and monthly?” I wish I had a nickel for every time I have been asked this — my Starbucks habit would be covered for life.



Unfortunately, this question often doesn't get asked until after fraudulent activity has already occurred in a practice. The fact is that there are just a few reports that, when run and used regularly, could have spared the frustration.

Now I know there are a few people that drool with excitement over the idea of cranking through reports and numbers; however, since many of us are not quite as thrilled with reports, I will keep the list short and sweet.

Daily Reports You Should Be Running

- **Day sheet.** It should only take the doctor 10 minutes to review this report every day, which lists all activity in the office for that day, including procedures completed and monies collected. The doctor looking through this report each day ensures that all procedures are recorded accurately—because I have yet to meet a doctor that

remembers a month later that Mrs. Jones had a DO on #19, not an MO.

- **Adjustments only day sheet.** There are so many reasons for adjustments, insurance being the main culprit. Because adjustments are inevitable, I recommend a cursory review of all the money that is being removed from the practice's bank account on a daily basis to identify issues. Then if something seems out of line, you can ask timely questions.
- **Deposit slip.** The numbers on this report should balance with all money that was collected for the day—credit card slips, checks, cash and electronic transfers. Keeping this balanced can help you stay on top of your finances before they become an issue.

Weekly Reports You Should Be Running:

Depending on the length of these reports, they can be delayed to run biweekly or even monthly. However, the longer the report, the more often it should be run and reviewed.

- **Insurance aging.** With the invention of the Internet, eClaims and electronic payments, it is no longer normal to wait 30 days for claims to be paid. Claims can be tracked online, and reports with the status of outstanding claims appear with each claim submission. Insurance companies are even oftentimes emailing the office that a payment is in the bank. This report should never be more than a few pages long.

- **Aging report and/or billing statement.** It is normal in the dental field to send out statements once a month. However, if you send out 300 statements on Thursday your phone will be ringing off the hook come Monday. Running this report every other week will ensure that you will never have to worry about not having the staffing power to keep up with calls or patients who are calling to schedule an appointment having trouble getting through. Consider splitting up your statements before sending them out, like in alphabetical order. Send A-G one week, then H-M, and so forth. This will keep the calls manageable. As a bonus, this will allow revenue to come in all month long.

Monthly Reports You Should Be Running:

These are great reports to review with your team at monthly meetings.

- **Practice analysis.** Have you ever wondered what procedure(s) account for the majority of your production? This report will tell you what was done each month. It can also be used to compare to the year over year in the number of procedures. This is valuable information that will truly allow you to keep your finger on the pulse of the practice and see opportunities to grow.
- **New patient report.** This will allow you to know who came in and how they were referred, as well as the return on investment (ROI) of your marketing efforts. You can know which of your patients are talking about you

because as a rule of thumb, your current patients should refer 70% of your new patients.

There are so many reports that can be run if you have the time and desire. I encourage you to explore some of those reports also, but if you don't have the time and simply want the basic reports for a successful practice, these are key to keeping an eye on your business and avoiding headaches down the road.

Published on Emmott on Technology October 25, 2015



*"Thank you for taking the time in
teaching us on how to be more
efficient & better office managers!"
- I. Roberts -*

The Little Things

By: Chris Ciardello

Recently I went in for my 6-month cleaning appointment and the hygienist I used to see was no longer there. I was so disappointed, however, the dentist hired a new hygienist that everyone raved was wonderful. Naturally I was a little nervous. I was worried she would pop the floss too hard, or use a hand scale the entire appointment. Luckily she did neither. In fact, she asked me if I preferred to be hand scaled or if I would prefer her to use the cavitron. I jumped for joy and asked her to use the cavitron!

Throughout the entire appointment she would ask about how I like my hygiene appointment to go - the little details. She continued checking with me to make sure that I was comfortable.



That's when it hit me! How important it is to make sure we ask people's preference about the little details. Too often we get caught up in our daily tasks we forget to ask questions.

One of the most important one to ask is how would you like to pay? We're not talking about allowing the patient to set up a payment plan within your office; rather in what manner they prefer to pay. Do they prefer to pay ahead of time so it can be off their mind? Or would they prefer to pay the day services are rendered?

It may sound odd; however, some patients like to pay when they've scheduled the appointment so they don't have to worry about it when they come in; and wouldn't we all like a practice full of this type of patient. Another patient might like to pay the day-of, yet before they go to the back so when the doctor or

hygienist is finished with them, they can go straight home or to lunch or back to work. Other patients like to wait to the last moment to pay. Those were the patients I kept my eye on because sometimes they would try to leave without paying, while others may just simply forget to pay because they assumed that insurance would cover their visit.

Some other questions to ask your patients are...

- What time and days of the week do you prefer your appointments?
- Would you like something to drink while you wait?
- Have you had a bad dental experience in the past?

My dentist has dual monitors in the operatory so that x-rays can be pulled up in front of the patient. This is to help the patient better understand the treatment plan. The second monitor is mostly used for the patients to watch Netflix during treatment. It's a great distraction for the patient, and helps time to go by faster.



Go the extra mile and ask your patients about their preferences for their dental appointments. You might even ask if there are any amenities they would like to see in your office. If you need help deciphering which amenities would be best for your office you can contact us at <mailto:info@GTSgurus.com> to setup a brainstorming session with one of our experts.

Chapter Four

Keep your Dental Practice Thriving with Recall

By: Denise Ciardello

Recall is the heartbeat of the practice. You've probably heard this, but do you believe it? I recently found myself in a room of young dental team members who were not so sure about recall. Their thinking was that the largest amount of production comes from the restorative operatories. In a way, they were right: a healthy general practice will find that two-thirds of all production is completed by the dentist.



However, they forgot to consider that any successful business, whether restaurant, pest control, or airline, rely and thrive on returning customers. While the emergency ant infestation will be welcomed by the bug exterminator, it's really not good business to hope for the phone to ring. The same can be said of a dental office. Knowing that you have a schedule full of productive appointments is the ideal way to run an office, and then you can make time for those emergency appointments that may or may not happen.

Focusing on recall patients is valuable to the dental practice in many ways:

1. You ensure that you will have return patients, hence the full schedule.

2. Because the majority of treatment is diagnosed out of the hygiene chair, you are feeding the restorative side of the clinical house.
3. Patients who have delayed diagnosed treatment, when brought back through the hygiene operatory, have that important time with the doctor to discuss the reason for the necessary treatment.
4. You will maintain retention as you continue to bring patients in for their regular checkup because it's easy for them to fall through the cracks when they don't hear from you.

When an established office finds itself needing new patients, I often recommend that they look through their database. Are there patients who they can reactivate by bringing them in for a regular hygiene visit? Most likely there are, and they would be willing to come back into the office since they are already familiar with the dentist and the team.

Start setting up a recall communication schedule to contact patients who haven't been reappointed. Regular follow-up with your patients can bring them back. Your dental practice software may provide a recall report that can help you quickly find those patients and their contact information, as well as provide automated activities such as printing postcards or sending text messages.

Keep your practice humming by focusing on returning patients and hygiene appointments, not just operatory procedures. Paying attention to recall is a win-win—your schedule will stay full, and everyone in your office will be happy. *Published in DIQ February 25, 2016*

Squashing the Dream

By: Cindy Day Hauk

Have you ever been told you can't do something? You are so happy to learn something new or try something you have never tried before; you are so excited and you feel the adrenaline flowing, then all of a sudden....SQUASH! There goes the dream!



I was lucky enough to have parents tell me that whatever I set my mind to do, I could do it! I felt like I could accomplish anything I wanted. This is what I was taught; it was what I believed. We all have dreams! Some big, some small -- they are our dreams! Not everyone dreams the same. We are all unique! What a dull world it would be if we were all the same!

I recently witnessed five team members have their excitement, of learning something new, snatched before their eyes. They were told they could not learn tasks on their practice management software that would allow them to post to the clinical chart and to their appointment scheduler. Time was set aside for them to learn the same thing other team members were allowed to accomplish. When they were ready to learn, their office manager comes barreling down the hallway and said “No, no you can't do that! A former team member messed up the whole program and I had to fix it! It took me months!” The team members were stunned and very hurt that because of a previous team member, they were not allowed to do what they wanted to accomplish. One became angry that they took time out to learn and were told not to learn it all.

Other team members questioned if they were smart enough. Others asked “Why, doesn’t she trust me?”

I see this happen in every aspect of life. It is a crushing blow to the spirit of a team member when they are told they CAN’T, over and over again. If you are told you can’t do something consistently, you start to believe it yourself. When I train team members or consult offices, I always explain a task and then let each team member understand how it affects other aspects of the office protocol or the software. Once the consequences are explained, generally most appreciate what it takes to perform a task correctly and feel accomplished when it all works the way it is supposed to. What do we create when we squash the dreams of our team members?

1. A deflated personal image
2. Mental anguish or anxiety
3. Create tension
4. Questionable integrity
5. Lack of Trust
6. Broken spirit
7. Discourage initiative
8. Lack of support
9. A “why bother” attitude
10. Resentment

Instead of squashing a team member’s hopes and dreams, support them in what they would like to accomplish. I am a strong believer in cross training. If you are an assistant or a hygienist,



learn aspects of how the front desk works. I believe that empowering each member of the team to learn other aspects of dentistry, you appreciate what your teammates perform on a daily basis. If an assistant aspires to be a hygienist, encourage instead of discourage.

Fear of change is very real. When a person really takes that step to want to learn yet continues to hear “you can’t do that,” they will start to feel they can’t. They won’t search further or strive to be a better part of the team. Zig Zigler said “You will get all you want in life, if you help enough other people get what they want.” Next time someone is wanting you to teach them something new, don’t squash their dream! “If you can dream it, you can achieve it.” (Zig Zigler).



Let our Team help your Team

We work with dentists and their dental teams to create the tools they need to maintain an organized, business-focused yet FUN environment.

Chapter Five

Branding Yourself is Easier Said than Done

By Chris Ciardello

One of the most important aspects of the dental practice is deciding how you want to brand yourself. What do I mean when I say, “brand yourself”? When you hear the word brand, what comes to mind? For me, I think of



Coca-Cola[®], McDonalds[®], Mercedes[®], Apple[®], Disney[®], etc. These are companies that have made a lasting impression on all of us. Can you picture their logos as you are reading their names? Then their branding is working. These companies have all branded themselves as leaders of their industry. Do you want the same for your office? This means that your patients will know your logo immediately when they see it. Your patients can also picture your logo every time your office is brought up in a casual conversation. How will you be able to make this kind of lasting impression?

1. Analysis of your practice name.
 - Is your current name working for you?
 - Do your patients remember it easily?
 - Does your name make it difficult to schedule patients with an associate doctor? If you plan on working with associates in your practice, a suggestion might be to have a practice name rather than the owner Dr's name. Speaking from experience, I worked in an office that used the doctor's last name, and when we brought on

an associate, we had a hard time getting our patients to accept the new doctor. Eventually, we changed the name of the practice to a name that had more to do with the location of our practice instead of who owned the practice. Once we did this, we had no problem filling in our associate doctor's schedule.

2. The Logo. You may need to find a graphic designer to discuss what you want your practice logo to look like... to *feel* like. This means, deciding on the atmosphere you want to give your patients. Fast food restaurants tend to pick the colors like red and yellow for their branding because those are fast colors in people's minds. When a person sees the golden arches, they know if they are in a hurry they can rely on McDonalds® to get them in and out real quick. It is typically recommended to brand yourself as a calming environment, and a place your patients could feel safe. Most dental practices stay away from the color red because it will tend to remind people of blood and make them frightened to go into that office. I would recommend staying with calming colors such as the blue, green, purple, and beige shades to draw patients toward your practice. Once you have discussed your name and the colors you picture for your practice, let the graphic designer do what they do best and get creative with what your logo should look like. More than likely, the first round of logos won't be exactly what you are looking for, but this will inspire you in a direction that will give the designer a narrower focus point.

3. Market it! You need to post this logo EVERYWHERE!

Any place that you **can** put this logo in your office, put it there. On the sign outside your door, your receipts, letterheads, business cards, a sticker



on the bathroom mirror, pens, pads of paper, coffee mugs, especially on any little give-a-ways you will give your patients to take home. I have even seen an office have blankets embroidered to give to their patients if they get cold during treatment. Then the patients get to take these blankets home! Talk about some great advertising when that patient takes the blanket to an outdoor event.

Branding is your first, and a very important first step to marketing your practice. It means that you and your practice will be the image that is drawn in a person's mind upon hearing the name, or seeing the logo. Be the Nike® swish or the Lexis® 'L' in your area as the go-to dentist in the community. A thoughtful marketing campaign of your brand can make this happen.



Spring has Sprung

By: Janice Janssen, RDH, CFE



Spring has sprung. I love Spring! It is such a beautiful time of the year...a time of renewal and revitalization. In many areas of the country, the grass and trees are beginning to come alive, so people find it time to spruce up the yard, flower beds and overall outdoor appearance of their yards. Others choose this time of year to clean out closets, attics or garages. Have you taken a good look at your office lately? Are there areas that have been overlooked or neglected? Many offices get stagnate as time goes on...now is a perfect time to reenergize it. Quite possibly, your office is in need of some spring-cleaning.

Here are a few areas your practice may do well to have some attention:

- **Office** - Many offices do not realize that cobwebs have formed in corners or there is dust on the windowsills or even drip marks down the front of the cabinets. These are things that can be overlooked if you are looking at it every day. When I was practicing hygiene, I had a vent in the ceiling above my chair. I once had a patient tell me he thought it was time to change the filter. When I looked up I could see how dirty it was. I had never looked at that filter, until that day. I encourage all of you to sit in the reception area and see what needs to be freshened up. Lay back in your operatory chairs. We are busy working all

day and these little details are often overlooked, however, imagine your patient sitting in the chair and see a dirty filter or cobweb on the ceiling. It is an immediate perception of 'non-clean' and doesn't really provide a very comfortable feeling, does it?

- **Insurance** - Have you taken a good look at your insurance systems? Could they use some cleaning up by modifying the methods, standards or goals? How much money is sitting in your outstanding insurance claims? If your outstanding insurance claims are not tracked regularly, it is time to put a process in place. Start calling these companies to see why the claims are not process and when you will receive the payment.

If you have had the same software for a long time, you may have many duplicate plans listed in your system. I recently saw 25 Delta Dental of MO companies in an office computer system, and they were all the same group number. To add to the problem, each admin team member was using a different one. The problem with having so many duplicates is that your team does not know which one has the accurate information and they may attach a Delta Dental plan that was added 10 years ago and therefore collecting or quoting the estimated patient portion incorrectly. This is a tedious process, yet the benefits far outweigh the cost and effort by helping your office run more efficiently.

- **Recall** -The recall system is the lifeline of your practice. To say it is important is an understatement. The majority of all treatment comes from a diagnosis in the hygiene

chair. In addition, this is also the area that keeps your patients as YOUR patients. Routine visits to the office remind patients how wonderful your office is and how much you care about their oral health. We often hear practice owners state that they need new patients. While this is true, what we also see are poor recall methods and allowing current patients to slip through the cracks; therefore, increasing the need for new patients. Do you realize that it costs 3 times as much to get a new patient as reactivating a patient of record? What are you doing to keep the patients you already have in the practice?

Here are a few areas we focus on when cleaning up the recall system:

- * Every patient should receive either an email, text, postcard or phone call letting them know that they need to schedule their visit. Are you sending your patients notification when they are due for their recall visit? How, when and who does it?
- * What about patients that are past due? Some offices do not ever follow up with the patients after their due date. Just because people do not schedule right away doesn't mean they do not want to come back to the office. Sometimes it is just a timing thing and they still plan to return. Follow up with them and get them scheduled.
- * What about the patients that have come in to your office that never even had their teeth cleaned? These patients are not in your recall system at all...therefore you are not



contacting them. Most practice management software systems have some method of tracking patients that have not been entered in the recall system. Take a look at yours and see how you can find those patients. Reach out to them and get them scheduled with the hygienist.



There are many other areas of your practice that I am sure could use some cleanup. What are they? Do you have old, outdated magazines that need to be donated to the local hospital? Have you taken a look at the

landscaping outside? Are there ceiling tiles that are looking dingy, cracked or discolored? Do you have stains on your floors that a good professional cleaning could bring them some new life? And finally, what about your team scrubs – are there stains, tears or washed out and a new set would look so much more professional?

We recommend taking a walk through your practice and look at everything from a patient's point of view. What is the experience they have from the moment they step out of the car, to walking through the front door, to the conclusion of the appointment? Make a list and tackle them one at a time to ensure that you and your team can accomplish your goals.

Well, what are you waiting for? It's time to get started!

Chapter Six

Siri®, Is that You?

By: Denise Ciardello

We live in a world with instant gratification and we are surrounded with digital technology that helps feed this hunger for immediate knowledge. How many times have you been out with friends and someone asks a question in which no one is sure of the real answer? Gone are the days of having to look information up in a book, or worse having to go to the library to find out the answer. Someone merely picks up their phone and asks “Siri® – who won the first Super Bowl?” Siri® answers the question and everyone is instantly gratified with the answer and continues on with the discussion. It’s a nice easy way to get around an obstacle that was preventing the group from continuing with the conversation because two or more people were not in agreement with the progression of the story.



Last week I was in a client’s office and was working with the office manager – let’s call her Becky - on creating some systems for more efficient A/R management. It seems that her numbers, although still within acceptable limits, are out of control for her (& our) standards.

As we began discussing her current method of operations, the hygienist poked her head around the corner and asked: “Is it ok to

do sealants on my patient?” Becky got out of the screen we were looking at on the computer and went into the insurance section to see what the ‘rules’ were for sealants for this patient’s plan, and then went into the patient’s account to see if the patient met the age limitations. She looked up and gave the answer to the hygienist. We got back on track with our review of her processes. About that time, the assistant asked if the new patient could have an FMX, the aforementioned steps were repeated and Becky gave an answer to the assistant. The Dr. interrupted our conversation with a question if Dr. Endodontist down the street was open on Mondays because the patient in his chair needed to go over there immediately.

It was about this time that I realized that Becky didn’t have a problem with time management; she had a problem with an identity crisis. Her co-workers viewed her as being Siri®. I find that this happens in most offices – there is one person that is constantly called to do everything from fixing computers to answering questions that could or should be available to the team elsewhere.

We broke off our conversation about A/R, and moved to a conversation about how Becky can empower her co-workers with the tools they need to complete their tasks.

We started with questions about insurance – more times than not the inquiry is about what insurance allows, the frequencies & age or time limitations. How does Becky get these answers? Ideally, routine questions have been answered during the verification process and noted in the insurance section of the practice management software. We find that some answers are not always readily available and may require a phone call if it’s not on

the fax or website, however, that should be the exception for routine procedures. Becky can apprise her co-workers where to find the information. The key here is consistency. If Becky tells the hygienists that sealant information is always in the same place and they often find it missing, they will stop going there and return to using Becky for their more accurate source of information. It's a waste of their time and they don't want to dig in the computer any more than is necessary. The same is true for all insurance information as it relates to time & age limitations, frequencies and standard clauses like missing tooth, replacement and number of quads that can be scaled in a day.

We are not trying to make the clinical team experts in insurance; they have their own jobs to do. We do want to give them tools to complete their jobs without having to take time out to speak with Becky about these limitations or frequencies. What happens if Becky is on the phone or speaking with a patient? The clinical team member is forced to wait until Becky is available to answer her question or worse, interrupts a treatment plan presentation and therefore upsetting the flow of the conversation and the possibly affect the acceptance level.



Many times, we find that the questions asked could or should have been discussed in the morning huddle to alleviate these disruptions to everyone's day. After all, the purpose of the huddle is to review the

needs of the today's schedule/patients, not rehashing last weekend's events or discussing the baby shower in two weeks. If you find that these are areas not covered in your huddle, consider

revamping your huddle agenda. (If you need an agenda, we have one to share – info@GTSgurus.com)

Instant gratification is not a bad thing. As humans, we prefer it and as Americans, we demand it. However, when it is at the cost of intruding on other people’s time management, consider your actions. If you are Becky – find ways to empower your team with the knowledge they need to complete their tasks and train them on ways that they can utilize these tools. Help them to understand that you are not Siri® and before they come to you with questions, they should ask themselves “Is this a true Becky question or am I being lazy and using her as Siri®?”

Published May 11, 2016, Dental Practice Management



Are You Contagious?

By: Janice Janssen, RDH, CFE



No, I don't think you have the flu. And I am not asking if you have poison ivy. What I want to know is...how is your attitude? What we fail to grasp is that our attitude, our approach to life, is contagious. We hear it all the time; so are you truly letting it sink in?

Think about this: It is 5:30pm; you are home with the kids; everyone is talking about their day, laughing and carrying on...your husband/wife comes home and is in a bad mood from a hard day at work; they are grumpy and crabby with everyone in the house. Has the environment changed in your house? Is everyone else still in a good mood and laughing having a good time? Or have the kids all scattered to their rooms and everything is quiet and subdued? Or worse, is there shouting and arguing? The same thing is happening in our offices. We just don't want to think about it.

Let me ask you this: How is your attitude at the office? Are you happy and in a good mood most of the time? Or are you the negative-nelly in your office? Be honest with yourself because this is important. Each and every one of you in the office affects the mood, and in turn, the cohesiveness and productivity of the office. You have a responsibility to be the best that you can be...let's start today!

First and foremost, if you are the negative-nelly...STOP IT! Things are not that bad. And if you truly think they are, maybe the

office you are in is not the right office for you. Are you bringing your personal baggage to work? Although it is hard to leave it at the back door, try giving your mind a vacation from all the noise going on in your world outside the office. It is time to regroup and realize what is important within the office.

We were recently in an office talking to one of the team members about their demeanor in the office. She stated she was having money problems and was stressed. We all understand that and can relate. It is tough! However, I am not thinking it is a good idea to jeopardize your job at this time. Do you? Now is the time to be the best that you can in your job. Let's start thinking about how we act and the repercussions of our actions, either negative or positive.

I recently read a quote from Tom Stoppard stating "A healthy attitude is contagious but don't wait to catch it from others. Be a carrier." What a great quote. YOU be the one that is going to create an upbeat and harmonious workplace. You can do it! Some days it may be difficult to be the happy one if everyone else is gloom around you, however it is possible and it is up to you.

Here are 3 ideas to change the atmosphere from doom to gloom in your office. They seem simple and may be a little hokey, but they work.

1. Smile ☺ - you can do that, right? Smile at everyone you see. You will be amazed at how many smiles you get back, even when people don't want to smile they almost feel like they have to when you smile at them.

2. Help someone out that is in need. Especially if they don't ask for help they will appreciate it and you will see their demeanor start to change.
3. Give positive feedback to your co-workers. Tell them what a great job they are doing, or how well they did with a patient or task. We all love to be appreciated.



Go out and put your smile on...be a carrier. 😊 You will be glad and so will your co-workers.

"Fun, interesting, informative - Global Team Solutions is the best! Great team!"

- S. Kalte -

"As always I have enjoyed my day with the Gurus. If anyone thinks that consultants are sappy/syrupy & overall unhelpful, they need to come to a GTS meeting! Thank you for the invite and helpful tips."

- M. Radley -

Chapter Seven

Lifetime Does it, So Should You

By: Chris Ciardello

Recently I was in a brand-new office and the discussion led to giving their prices over the phone. Lisa had always given the patient the price of a crown or a filling over the phone in her previous office, yet now was told she should not do this and she couldn't understand why. This new office was a ground up building and no penny was spared on the décor. I thought I would explain it to her with a strategy that my gym uses.

Right after college I was shopping around for a new gym because I could no longer use the one at my school. I walked into Lifetime Fitness because I heard great things about



them and they were close to my apartment. Michelle was the sales associate and she explained all the amenities Lifetime had to offer. Hot saunas (wet and dry), towel service, every member got a locker, indoor and outdoor pool, hundreds of cardio and weight machines, and any group fitness you could think of. She said that yoga used to cost extra but they changed their policy so it was included. I decided it was time to ask her how much the monthly cost; this is the main reason I came in, knowing that if it was too high I was going somewhere else. Michelle said that she wanted to take me on a tour of the gym so that I could evaluate the facilities myself.

As we walked around I noticed the granite benches in the locker room, tile and hardwood flooring throughout, and even though there were people working out, it was not packed like sardines. As I walked around I was certain it was going to cost a pretty penny & did I mention that I was fresh out of school? I had explored other gyms, which cost between \$30-50 and I had a feeling, based on this environment, it was looking at double that. After the tour she brought me back to her office and told me the monthly rate was \$65. I was pleasantly shocked. Considering I had looked at the other gyms that appeared to be unsanitary and extremely crowded, the cost difference was worth it to me. I felt it was worth paying the little extra money.

As I explained this experience to Lisa, I could see it opened her eyes. This is a beautiful practice with a warm homey ambiance, people need to come in and see it in order to make an informed decision. I encouraged her to no longer give prices over the phone because people may write off her location simply because of the price without realizing the exceptional care a patient receives due to the state of the art technology they were incorporating.

I encouraged Lisa to take new patients on a tour of the entire practice when they come in for their appointment. Show them the lab, sterilization station, x-ray machines and finally the operatory where they will be seen. They will truly appreciate all the hard work and effort they put into building this practice so that patients can be confident in the care they will receive.

I would like to encourage you to do the same. Take new patients on a tour of your practice. Be proud of your practice and show it off. If you don't want to show off your practice it may be

time for a change. This change could be as simple as painting the walls, buying some new artwork or maybe purchasing some new equipment. Your office is a reflection of the quality of your dentistry. If you want to retain patients and gain plenty of new patients, make sure your office reflects the quality of your work.



Looking for more opportunities to learn?
Great! Visit the Global Team Solutions Blog
and get more great articles just like the
ones in this book.

Visit Now!

<http://GTSspeaks.com/blog/>

Stirring the Pot!

By: Cindy Day Hauk

Most of us have all had some experience with a team member who loves to “stir the pot”! You know, those who are just never happy unless they are creating havoc, and trying their best to create



themselves as the center of attention. So, what do we do with those sweet souls? What does it mean by stirring the pot?

I have been in and worked in several offices in my 30 years of dentistry. There is usually that one person, or multiple persons, that like to belittle another team member or just don't know when to stop their sarcasm of another team member. As an example, a person does not like how another team member performs her daily tasks, so she or he goes to another team member and complains about how that person doesn't know what they are doing or why does she keep putting in emergencies? In that instance, the “pot stirrer” tends to try to persuade the conversation to their side and gain control of other member's thoughts and how they react and treat the person they are talking about. Taking sides start to occur in the workplace.

We are with our team more often than we are with our family. We all know that not all family members get along all the time. There are disputes, but at the end of the day we are all still family. Eight hours a day we work with different people that have been chosen by the owner or office manager to blend with the rest of

the dental family. Sometimes it works and sometimes it doesn't! When a person is hired, they are hired due to their work experience and references. They may have years of dental experience but may have a personality that tends to want to divide team members to their way of thinking. Personalities are a huge factor in how that employee interacts with the rest of the team. There is no way to know how every single person is going to treat other team members until they are placed in the office. Most feel that the job they are performing is what they do best and are doing it the right way. If someone has another idea of how to perform that particular task, they may be criticized that it is the wrong way, or made fun of for doing something differently. There is constructive criticism and there is criticizing to a point of demeaning the person and just plain stirring the pot.



The pot is consisted of all team members including the dentist. When something is said behind another's back and consistently hurts or offends another, we call that "stirring the pot". Using English.com defines "Stir the Pot" as "To stir the pot is to agitate a situation to cause a reaction or trouble".

If there is someone in your office that is constantly stirring the pot, how do you handle the situation? Are you writing them up for this? Do you have a three strike you're out policy? You may want to refer to your HR (Human Resources) department to find out how to handle these situations. If you do not have a HR department refer to someone that specializes in HR laws and policies. If a team member is constantly bringing down the morale

of the office, it becomes something of a disease and may need to be cured of that disease. Removing that person from the team is sometimes an option to keep the office healthy. It is important to show the rest of the team that they are important and they should not have to work with constant havoc and drama. Everyone should be able to come to work and perform their jobs without the tension from a “pot stirrer”.

“The first step in solving a problem is to recognize that it does exist”. Zig Zigler



"As I am new to management this conference was awesome! It was in a relaxing environment and I really got to participate and enjoyed it a lot! I will take everything back to the office. This was awesome!"
- M. Gullo -

Chapter Eight

Fighting the Fraud Tidal Wave

By: Janice Janssen, RDH, CFE



It seems as though fraud is everywhere in the news today – you hear about mail fraud schemes that bilk thousands, if not millions, of dollars from innocent victims all over the world. There are the internet scams where someone you know very well is stranded in a third world country, flat broke or a victim of a theft and needs money now. Chances are you personally know someone who has lost hard earned money or a large part of their savings to one of these schemes.

Sadly enough, there is fraudulent activity happening just as often in dental offices across America. When we begin introductions in our classes and seminars, there is always at least one or two that will begin introductions with “I began working in this office, following an embezzlement...” It always stings because I know firsthand how painful it is to the Practice Owner and the entire team. It happened in my office and sadly, I am the one that discovered it. It was so traumatic that it became my personal mission to find a way to fight fraud from happening in as many offices as I can.

Although there is no automatic foolproof method to prevent embezzlement, there are steps that can be taken to thwart or deter fraudulent activity.

First and foremost, if your gut tells you that something doesn't feel right, then listen to your gut. Contact me immediately and let's check it out. Think of this as decay in a tooth – time will not heal it; it will only get worse until it's screaming at you in pain at 3am.



Second, if an owner wants to counteract fraud, start from the top. Create a Standard of Conduct and be the example of that standard. This standard includes everything from insurance, to scheduling, to presenting treatment and of course, handling all monies. If the Dr. takes money out of petty cash for personal use, this is the example being set as the acceptable standard. If the Dr. allows a build-up to be charged out as a filling because it will help out the patient by getting paid through insurance, that Dr. is setting the standard of conduct. If an employee perceives that 'working the system' or skirting the rules is acceptable, then the employer is allowing fraudulent activity to occur. Cheating is cheating and should never be tolerated. Cheating in any way, shape or form is not acceptable and anyone caught doing anything adverse to the standards has automatic consequences.

Finally, know whom you are hiring by checking references. We often see this process delegated to someone else in the office. Our rule of thumb is: whoever is signing the checks, calls all

references and speak to the person that signed the paycheck at the previous office. Make it a habit to talk employer to employer.

There are behavioral habits that are well documented and I subscribe to those as well; namely, everyone in the office has to take their vacation time out of the office, whoever balances the daily deposit is not the person taking the deposit to the bank, monthly reconciliation of bank and credit card statements.

An additional step that you might want to consider is a program that we have created: Risk Analysis & Monitoring (RAM) - (visit www.GTSRAM.com). This begins with a review of past trends to understand the systems in place with the office. The analysis includes a deep dive into the inner workings of a practice's financial habits. This evaluation will typically draw out all inconsistencies and misappropriations. Following the initial analysis, a written report is shared with the practice owner containing expert recommendations and training where needed. Routine monitoring of the practice's systems follows throughout the year, again with written reports of all findings and recommendations.

RAM has been beneficial for practice owners to know that someone is watching, as well as helping those responsible for the finances of the practice, know that they are following the best practices rule. If you would like to add this ever-important step to your fight



against the fraud tidal wave, please contact me at: Janice@GTSgurus.com. Let's discuss how you can strengthen your arsenal and avoid becoming a statistic.

Unfortunately, fraud is as prevalent in the dental office as it is in the real world. With enhanced actions in prevention and some outside eyes, your office can be that much closer to making sure that your money is going into the bank and not in someone else's pocket.

Published in DIQ July 12, 2016



“We were referred to Janice and her team to help us investigate a potential embezzlement scheme. They were professional and knew what they were doing. Through their efforts, we were able to settle with our insurance company and recoup a great deal of what we had lost.” —Dr. M. Drennan, DDS

What to do; When There's Nothing to do

By: Denise Ciardello

The lazy days of summer are upon us. The kids have been out of school long enough that the typical routine of school, and extra-curricular activity schedules are a



distant memory. The long-awaited summer vacation has completely faded from the memories and the pictures are still safely tucked away in the iPhone®. This is when those dreadful words make their yearly entrance ... I'm bored. I learned as a child to never utter those dangerous words since my mom had this incredible propensity to spout a catalog of activities to relieve our 'bored-ness' – cleaning cobwebs out of the corners of the laundry room, scrub the baseboards, organize our toys, straighten the pantry or the very worst of all, pull weeds. These were all jobs that needed to be done yet not on the routine list of chores. I detested having to do any of them.

Last week I was in an office that had a schedule that utterly blew up – in a bad way. Suddenly all the afternoon patients were falling off the schedule and there were employees standing around with nothing to do. One assistant asked the office manager if she could make a Starbucks run for everyone; oh, and use the petty cash (My first thought was to send them all home). As the assistant walked away, with cash in hand, I picked my jaw off the ground and began working with the office manager on a 'bored' list. This isn't something that is publicly posted, it is a "secret to-do list" for the times when there are no patients. It will be handy

for the office manager and give the practice the ability to properly utilize their employees when the schedule blows up.

Let's see if we can create a list for you for such times.

Around the office:

- Sort through magazines in reception area and operatories
- Wipe down the front and top of cabinets
- Clean/organize drawers – in the lab, in the operatories, in the front office
- Wipe down/ dust all the frames & pictures
- Wash windows or anything glass
- Clean out the refrigerator(s) – break room &/or lab
- Change the A/C filters
- Sit in operatory chair – look up – dust any/everything, change ceiling tiles, get bugs out of lights
- Lift the operatory chair all the way up - clean under chair and the floor

There is a plethora of things that could be on this list – organizing or reorganizing the trays, carts, drawers, supplies in the lab &/or operatories or the supply closet.

On Productivity; run the following reports:

- Outstanding Pre-Authorizations
- Unscheduled Treatment
- Overdue Recare
- Broken Appointments
- Overdue lab cases

Of course, this is above and beyond the regular Accounts Receivables, Insurance Aging and Recare reports. These reports should be tracked on a routine basis.

On Office Promotion/Marketing:

- Take pictures of the office and each other for website & Facebook posts
- Research dental articles for patient education
- Take dental care packages to neighboring businesses
- Prepare hygiene and new patient bags
- Start from the car and walk through the office, with the patient’s eye, to see how the office could improve in image.



When I was 15, my first job was at a chicken fast food place where my manager would say, “If there is time to lean, there is time to clean”. That mantra has stuck in my brain and I repeat it at appropriate times. The fact is

if an employee is on the clock, the business owner deserves to get his/her money’s worth. If you take the king’s money, then you will do the king’s work. Standing around doing nothing, running to Starbucks, browsing Facebook/Twitter/Instagram, texting or chasing Pikachu does not constitute as doing the king’s work.

Every office manager needs to take a page from my mom; have a mental inventory of tasks to put a ‘bored’ employee to work immediately. Eventually



you will have employees that will find ways to keep themselves busy and allow your boss the piece of mind that he/she is getting the most for all of their payroll dollars. If you find that you need some assistance with this or any type of coaching in your office, please feel free to contact me at denise@GTSgurus.com.

"Denise & Janice are both very entertaining along with filling you with informative ideas to improve your practice. They capture your attention from start to finish."

- C. Vosburg -

"I attended the Hinman dental meeting and have written many protocols already. I can already feel a difference in the feel of the staff. I even created a check list for lab cases."

- Sharon -

Chapter Nine

Address the Mess

By: Chris Ciardello

There are many marketing minds that insist that patients should be welcomed into your practice as though you were welcoming them into your home. An ideal way of beginning this process is to give new patients a tour of your office, to include the sterilization area which will assure a patient that your office takes pride in keeping the patient's safety a vital factor during the dental appointment.



As I have been going into offices lately, I am surprised to find so many with areas of papers &/or charts stacked up in the corner of the desk or even on the floor, sticky notes all over the cabinets in the front office, the lab and even in the operatories, old equipment – broken printers or monitors – in the consult room and ‘stuff’ that doesn’t belong out. Something equally frustrating is a member of the team complaining because they can’t seem to find what they need.

When Dr. Stratton first opened Dominion Dental Spa, the assistant Peggy was in charge of organizing the cabinets, lab, sterilization, essentially every part of the office. She put everything in its place and our office started to run smoothly. Until one day, Peggy didn’t show up for work and we never heard from

her again. Dr. Stratton pulled me to the back to help her assist until another assistant could be hired. We found that we had a hard time locating the supplies that we needed. We could not understand the rhyme or reason of Peggy's organization system. Dr. Stratton and I decided to come to the office on a day we weren't seeing patients to organize everything.

We first tackled the sterilization station. We removed everything out of the cabinets and gathered like items, such as anesthetic carpules, syringes and needles. We also grouped them on the counter the way we thought they should go in the cabinets. This would maximize our efficiencies of turning rooms over and sending instruments through sterilization. We created a stack of supplies that we were unsure where they should be stored. We then put everything back in the cabinets and adjusting or rearranging wherever we needed to accommodate the space.

Once everything was put away, we addressed the supplies we were unsure about. We left this for the end so we could see what cabinets were full, and which ones had some extra space. After we finished the sterilization station, we moved on to the operatories, and then the lab. It actually took us two days to go through everything and find the best place for it.

I'd love to say that was the last time that we rearranged all of our supplies, but it wasn't. Over the next year we would reassess this system every couple of months since we continued adding new treatment procedures such as Invisalign, Snap-On Smile, and implants. Once we organized our supplies, we were more comfortable offering the new treatment to our patients and our office looked incredibly prepared for any and all procedures. As a result, we found that when we were more organized, the office ran

much more efficiently and we had more confidence in the care that we brought to our patients.

I would like to encourage you to take a look at your office and see if there are any areas that are disorganized. If there are, set aside some time to address the mess and find ways to clean the clutter to help make your job run smoother. Getting your office organized can also relieve the stress and tension that could be building inside your team. My grandmother would always tell me that my room was a direct reflection of my life. If it was clean and orderly, I had things under control and I would not feel as stressed. However, if it were disheveled I would have a hard time getting where I wanted to go in life. Whether we want to believe it or not patients also make judgments on the cleanliness of your office. You've probably heard that people judge the cleanliness of a restaurant by the bathroom; do you think that they may consider clutter as non-sterile? Take a look around – through the eyes of your patients and make it presentable for them and less stressful for you. If you feel that you could use some help getting organizing in your office, give me call; I'd love to help.



Shake it up! Is Your Team Cross-trained?

By: Cindy Day Hauk

Have you ever experienced that awful feeling you get when a team member calls in sick? How about the front desk team member who checks on insurance eligibility and enters the benefits into your practice management software? What do we do now? Many dental offices focus so much on training a particular team member, for a specific job, that they forget to plan for the “what if’s”! What if Diana,



the insurance coordinator is out sick. Who is going to check on insurance eligibility and who is going to enter that information in the computer? Debra, the receptionist has only been trained to answer the phone and make appointments. She has had no training on insurance. The schedule is full and $\frac{3}{4}$ of the patients that are scheduled have insurance and several are new patients. Panic sets in and the office is in chaos!

There is no time to call in someone with insurance experience. So a few things will happen, you may need to reschedule some of your patients, or tell the patients that you will have to call them tomorrow to tell them their breakdown of benefits, or we can't give them a treatment plan because we don't have anyone to put in the insurance. All of these examples are not productive answers for your practice.

Training your front team members, each other's job duties, will help in emergencies such as a team member out for the day due to illness, vacation or a change in employment. The ability for team members to step in for another will keep your office flowing and continue to be productive.



I was in an office recently that had just lost a team member due to a change of employment. That person's job was insurance. She was the only one who knew what to do with insurance and how it functions in their computer system. It caused a huge backup in sending out claims, checking insurance, discussions with patients of coverage and a loss of production. The office was in chaos and patients could see the strain it causes.

Take the time to ensure this does not happen in your office. There are some jobs that cannot be cross trained such as the hygienist or the dentist. The dental assistants should know all aspects of assisting and how to handle the "what if's" just as front team members should know how to make a smooth transition to filling in someone else's position for the day or while someone is out on vacation.

When I worked in an office there were always team members that were cross trained. Front team members knew how to suction and take an x-ray. Assistants and hygienists knew how to answer the phone, make an appointment and post a payment. On a perfect day in a dental office, everyone is performing the duties they were hired to do. For the days that we have that test, those "what if's", it

is great to have smooth hand-offs so the dental office runs smooth and productive.

Other reasons for cross training are for those that are bored or need a challenge. This is when you want to shake it up! Have the insurance person change spots for a day or two a week and have them sit as the



receptionist. Or have the receptionist sit in and take care of insurance. A great example of this happened in an office I was in recently. Two of the front team members were becoming bored with their jobs and their attitudes were starting to show. I spoke with the Dentist and the Office Manager and suggested they have a shake up and change positions with these team members. I was told after a few weeks that the “shake up” was a success! They could not believe the change in their attitude of coming in to work! Just knowing they were able to perform different job duties on different days gave them the challenge they needed to put the spark back into their work. It made it fun! That is what we all want; to have fun with what we do! If you need help with cross training your team members, contact us at Global Team Solutions

"Thanks so much for your informative & fun training - I enjoyed the interactions with all. You brought out the best in all of us. You are truly the gurus of training".

- D. Spiers -

Chapter Ten

A Goal by any Other Name is a BAM

By: Denise Ciardello

What your practice needs to know about goals and why the BAM (Base Amount to Meet) goal should just be the beginning.



What goals are set in your office? Daily? Weekly? Monthly? Any? This is one of the first questions we ask and 90% of the time the answer is crickets. ‘We know we

should’ or ‘We’ve talked about it’ or ‘We just try to schedule/collect as much as we can everyday’ are the typical responses. As we discuss the schedule with the clinical team, we hear things like ‘We are twiddling our thumbs one day and don’t have time for a bathroom break the next’. I would like to break down the necessity of goals and define the mindset needed when discussing goals.

First, when we ask if an office has a goal, the follow up question is: Do you recommend having a goal? We answer with a resounding YES! How do you know you’ve hit your mark when you don’t know what the mark is?

This is your BAM (Base Amount to Meet). This is the total needed to keep the doors open – to keep the lights on, pay for supplies, rent, utilities and meet payroll needs. We have found that

if the team is aware of this number, they will understand and appreciate the need to know the BAM.

There are two ways to think of this goal:

1. This is just the beginning
2. This is all that is needed

Hopefully, your team will be in the mindset of #1 because it should be just the beginning. At times, I wish we would just call it BAM since the word “GOAL” means that you have achieved the top, the end, the apex. In football or soccer, when you make a goal, you’ve achieved your purpose. In this scenario, we are at the bottom line. This is actually the starting point for where we are going.

Sometimes upon further probing with the Dr., we find that a goal is not set because when a goal is met, the team expects a bonus. Now, in my opinion, we are comparing apples to oranges. If a bonus is in the discussion, it is not with meeting of the goal, yet for exceeding the goal. The goal in the aforementioned discussion is based on production; the goal on any bonus needs to be based on the collections in the office. A bonus can only be paid on monies collected, again exceeding the totals of meeting overhead.

Taking this conversation a bit farther, let’s say that the team would really like to go to the Midwinter conference in Chicago next year, buy a piece of equipment, or participate in a team building retreat – the team may set a BHG (Big Hairy Goal). Let’s say that the monthly goal is set for \$90,000 – again we are talking about collections – the goal is moved to \$92,000 with the

additional \$2,000/month going toward the BHG. No bonus is calculated until the \$92,000 mark is exceeded. There are thousands of ways to create a ‘bonus’ system; our strongest recommendations always include calculating it based on collections. (If you are looking for bonus systems – contact us: info@GTSgurus.com)

To wrap up this discussion, each office needs a goal – a target defined – whether a bonus is paid out or not. If you don’t have a target, you will hit it every time.



The mindset should be that the BAM goal is just the beginning; it is the reason you can keep your lights on every day; it is the *initial* mark to meet. A team is stronger knowing that together they have a target to aim at and will together celebrate reaching that target. An additional goal – BHG – could be set to aim for a long-term goal such as a trip or piece of equipment that the team is really wanting. We are a competitive society and having a goal, a target, to reach is something in which we all can relate. Let us help you reach your goals. Contact us at: info@GTSgurus.com.

Published: September 13, 2016, Dental Practice Management

To Floss or not to Floss? By: Janice Janssen, RDH, CFE

A response to the recent article that stated flossing did not help gum health.

On August 2, 2016, the dental world was turned upside down when Jeff Donn released an article titled *Medical benefits of dental floss unproven*.



When the article was published, you could hear a collective sound across America of people digging deep in their bathroom drawers and throwing out the years of floss that had been put into their hygiene bags. People were now given permission to not do what so many claimed they did, but didn't actually do anyway. No more having to make that embarrassing confession to the hygienist every six months when asked, "How often are you flossing?"

Donn's article cited several reasons that flossing does not help avoid gum disease and that this is nothing more than a marketing ploy by big businesses like Proctor & Gamble to sell this useless piece of string and the American Dental Association (ADA) to charge for the seal of approval to these companies. He continues by saying that the ADA and the AAP (American Academy of Periodontology) cite studies to prove their claim that flossing prevents buildup, plaque, gingivitis and tooth decay; however, these studies used outdated methods and tested few people.

'Outdated methods' is an interesting statement because the method of flossing has not changed, in any dramatic way, since

Levi Spear Parmly invented it in 1819. There have been slight adjustments with the wrap around method vs sawing and/or snapping the thread but no major changes in the methodology.

The statement that the *process has been tested on few people* is where I have to take an extreme exception to the theory in his article. Let's look at this in a logical manner. How do you prove that floss does not prevent gum disease?

In order to have a valued study you need to have two groups of people; Group A and Group B. All participants must possess the exact same oral and medical health, since we know that things like chemo, tobacco, diabetes, pregnancy, etc., affect the health of the gums. This study is already dead in the water because we know that is it virtually impossible to find two people that meet this requirement, much less enough to exceed Donn's definition of "few." However, since we are working on theoretical information anyway, let's continue with the discussion.

Next we need to set the parameters – Group A will be the flossers and Group B will be the non-flossers. This is where the study must stop. We are trying to prove that flossing does not prevent gum disease – that means that if we ask a group of people to stop flossing and they acquire periodontal disease, an irreversible disease that has been linked to other medical issues like heart disease, we have performed a study that is completely unethical. This would be similar to getting a group of people to begin smoking to prove that it doesn't cause lung cancer.

How do you prove that flossing does or does not prevent gum disease? The simple answer is that you really can't and remain ethical in your studies; however, I have seen first-hand that

patients who floss have less bleeding, inflammation and plaque than those who do not. Therefore, they have less gum disease. As a hygienist, I could tell those people who actually flossed and those that didn't merely by the health of their gums. I realize that some people like to think that hygienists are just saying that to get you to floss, but I will tell you if you bring me five people who floss and five that don't, I will be able to pick them out without a problem. For me, I say irrefutably that flossing is an important part of a patient's daily hygiene routine. Sorry folks, unfortunately you are going to have to keep flossing. I hope you didn't throw away all of your floss!



Published: September 29, 2016, Modern hygienist



Chapter Eleven

A Time and Place for Social Media

By: Cindy Day Hauk

Do you know anyone who was unable to get a job or was fired due to social media? In this ever-changing world of technology, millions of people have access to social media sites. Over time our



language has changed to posts, likes, tweets, viral, and texts. Some often forget that our friends and family are not the only ones able to view our posts. Someone likes a post and it goes viral and now it is out there for all to see,

especially bosses and people in the workplace that have the ability to hire and fire you based on how you project yourself on the social media sites. If you were to search for people being fired due to postings on social media, you will come up with thousands of examples of what NOT to say. Inappropriate language, photos, or derogatory comments about the workplace, the boss, or co-workers are posted frequently and that behavior can and will cause dismissal from the workplace. It can also prevent you from being hired. What is posted on your sites, about your behavior, speaks volumes to a potential employer and will then interpret what type of employee you might become. Negative verbiage may backfire to what you may have intended to post and may offend or cause potential employers to look to the next applicant.

On the flip side, social media can be positive and work in your favor to project a positive outlook on not only you but your

practice. Posting smiling patients, happy with their experience from their visit to your office are positive and show people that you have a great place to take care of your patients. People love to see what their dentist is doing in the community. Are you visiting a school, are you helping someone in need? Positive brings positive! We can make social media something that will help us



shine or help us decline. Negative brings negative. Remember that everything you post, everything you do, will follow you always. The days of the printed resume are no longer the only portrayals of our past accomplishments or blemishes. References are no longer the only thing that may help us land that dream job. When we utilize social media, we are building a cloud resume that cannot easily be removed if there is something we post in anger or frustration. It is out there on the internet for all to see.

There are so many different sites that can help build our reputations and also help build our clientele. There are many “apps” that are accessible that will provide our patients and our clients easy access to see what services are provided, what hours you are available, and what other patient’s and client’s perception is of your office and



THINK

- T** = Is It True?
- H** = Is It Helpful?
- I** = Is It Inspiring?
- N** = Is It Necessary?
- K** = Is It Kind?

your providers of service. I remember a saying my Mother used to say, “If you can’t say anything nice, don’t say anything at all”. I appreciate that advice from her, as it has helped me to think before I speak.

Follow us on Social Media!

Facebook.com/GlobalTeamSolutions

Twitter.com/GlobalTeamSolutions

Linkedin.com/company/global-team-solutions



"Definitely would like to start to expand our social media goals!!! It's free advertising and fun to do!"

- T. Bianco -

John, we are Ready for You

By: Chris Ciardello

Growing up with a younger brother was like having a sidekick 24/7. We would build forts, play tag and battle it out as our favorite X-Men characters. Naturally, from time to time we would get ourselves into some trouble and get a lecture from our parents. Something I would always get a laugh out of would be when I would do something bad and my parents would yell my brother's name instead of mine, realize their mistake and try to recover from it. It would bring about some laughs and the lecture (or punishment) was never really as bad afterwards. I've seen this happen to plenty of parents with their children. Have you ever called your children or a friend by the wrong name?

Let's move this into your dental office: Have you ever called or brought the wrong patient back to the operator? This can be disastrous in a dental office, and yet it happens more often than you might think. We're going to review some ways to prevent this kind of mistake and how to handle it, should this occur in your practice.



Recently, while speaking at an event, an attendee told a story about a time when two patients with the same first name (John) were on the schedule. One was in for a hygiene appointment and the other was for restorative work. We were told the assistant, 'Betty', went to the reception area to get the patient and called out for John. As luck (or unluck) would have it, there were two Johns

waiting and the wrong John stood up and followed Betty to the back. The patient was seated; vitals were taken and they completed the filling for which this patient had been diagnosed. It was about that time that the hygienist began looking for her 'John' when the mistake was realized. Luckily, both Johns' needed the exact same treatment on the exact same tooth. The assistants explained to the first John they just completed the filling because they had time to do that today prior to his cleaning and he went over to have his teeth cleaned. The 2nd John went into have his treatment completed. This office was incredibly lucky because this could have turned into a bad situation really fast.

Another story was told at that same event about an associate Dr. working with the office. The assistant set up the operatory for treatment that was meant for a different patient than the one they brought back. The doctor goes to the operatory and began working on a perfectly healthy tooth, realizes the mistake, filled in the 'error' and addressed the situation with the patient. The patient understood and was fine with the doctors' explanation. However, both of these situations are very dangerous for any dental practice and could lead to lawsuits that could shut down the entire practice.

In the first office, a previous office manager had instructed the team not to use last names because that was a HIPAA violation, which is not accurate. They quickly developed a new protocol for the entire team; they will now call patients by their first and last names from the waiting room ("John Smith"). This will ensure that they are calling the correct patient back. By the way - the only way it would be a HIPAA violation is if you called for "John Smith for a cavity on tooth #4" in the waiting room. After that was explained to this team, one of the assistants said that when she has an older patient she prefers to say "Mr./Mrs. Smith". We

encourage that because it does show a sign of respect and last names tend to be more unique than first names.

The 2nd step we recommend to be implemented, to ensure that you have the correct patient, is to look at the patient's date of birth once they are in the operatory. This was a big step both



offices seemed to be missing. These are both large offices and until these situations, they thought they knew their patients well, giving them a false sense of security that they would not make this mistake. The likelihood that you will have 2 John Smiths in your practice is small but could happen (I've seen it with more unique names). However, it is almost impossible for both John Smiths to have the exact same birthday. It could be the same month and/or day, but not the same year as well. When you go to verify their DOB, it is advised that you ask, "Can you verify your date of birth?" as opposed to "Is your birthday September 28th 1986?" Many times, your patient may not be paying attention to the date you state and will say "yes" assuming you know with whom you are working. Make sure they are interactive with any identifying questions.

If a mistake like this has happened in your office, or happens to your office, the first thing is to rectify the situation before determining how it happened. Pointing the blame to one or more people is not the way a team works together. Do some detective work to see where it went wrong, and come up with a plan to make sure it doesn't happen again. Sometimes the wrong patient

gets checked in on the schedule, other times you call for the correct patient but the wrong one stands up and goes to the back. We are all human, and we all make mistakes (patients included). All you can do is make sure that you have the protocols in place to ensure you have the right patient in the chair before the doctor starts to work on the patient. If you find yourself needing some help in putting proactive protocols in place, contact me: chris@GTSgurus.com. I would love to help keep these situations from occurring in your office.

**Looking for CE credit?
We've got what you need!**

Global Team Solutions offers
study clubs, workshops, online training
and more.

Visit <http://GTSspeaks.com/>
for more information.

Chapter Twelve

Lesson Learned from Black Friday

By: Janice Janssen, RDH, CFE



Wow! Thanksgiving has come and gone...crazy, isn't it?! I had a wonderful holiday surrounded by the love and laughter of my family. I hope you all did as well. Like many of you, I ventured out for some holiday shopping on Black Friday.

Yes, I am a crazy person but it's not by choice; it happens to be my 13-year-old daughter's "favorite holiday". There were a few things that occurred to me as I shopped and I would like to share some of those thoughts:

Customer service continues to decline in this country. I know you all already know this, but humor me. I found myself in the Disney store with my sister and we commented that the customer service was poor even in the Disney store of all places. There are 2 thoughts here:

Why do we expect more in some places than others?

I expect more from Disney because I have received more from Disney in the past and their messaging tells me I should expect more.

Is your practice consistent with the customer service and messaging you send to your patients?

Of course, we want everyone providing the highest customer service possible. However, if the process is not something you can keep up or only happens when you are not busy, you should think about the message you are sending to your patients because they come to expect what they have received in the past.

We encourage you all to have a meeting and decide the message and level of customer service you would like to provide, as well as what is reasonable to accomplish on a consistent basis.

What is it that we expect exactly?

This is a tough one, and I think everyone is different in what they expect from a customer service standpoint. The real trick is to attract the patients that are looking for the kind of customer service you can provide.

You will need to do this through your marketing campaigns, as well as your service provided in the office. We all know the best referral we get is through our patients.

We have seen practices on all sides of the spectrum when it comes to customer service. I wouldn't say anything is necessarily right or wrong, unless your customer service is non-existent, it just has to speak to your patients.



Are you showing your “busyness”? Our offices get busy, I understand that, but what are you portraying to your patients? We recently attended a conference that it was very evident that the

team running the show was BUSY! I saw this again in some of the stores on Black Friday. How does it make you feel when people show you how busy they are? It is a bit disconcerting, isn't it? It makes us feel uncomfortable and we feel like we are interrupting them. Let's not let our patients feel like they are a nuisance or a bother. They should feel like they are the center of your attention even though you may have 5 other "balls in the air" that you need to be taking care of at the time.

Another observation was from the other shoppers. It is difficult to see people being so hateful and disrespectful after a day of THANKS! There are a lot of great deals out there, but believe me you are going to be just fine if you don't get the big screen television for \$50 off.

Be kind. I heard a lady at the checkout tell a story that she was going to pick a shirt up and someone came and grabbed it away from her. If that's not bad enough, the lady looked at her and said "Ha, ha...you wanted this didn't you!"



I enjoy shopping on Black Friday because it is a tradition my mother, sisters and I started years ago when my children were very little. We get up early, shop, eat breakfast, shop, eat lunch...etc. My daughter started coming with me a couple of years ago and loves it! It is our day with just the girls of the family. I say this to point out that we should all give a little more of ourselves each and every day. Enjoy the people around you. Smile at

strangers...I know mom said not to talk to strangers, but a smile is OK. ☺

"As always I have enjoyed my day with the Gurus. If anyone thinks that consultants are sappy/syrupy & overall unhelpful, they need to come to a GTS meeting! Thank you for the invite and helpful tips."

- M. Radley"

"Very interesting & fun presenters of tons of information on every aspect of the dental office!"

- J. Shackelford -

"It was a pleasure to attend your course, I learned a lot of information from you and the class was very informative. You guys are great. I received the push to continue to do what I love :)"

- Y. Davis -

"This course was just the perfect length with adequate information. Great value!"

- T. Burchfield -

She Cancelled Again?

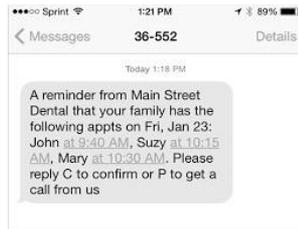
By: Denise Ciardello

It seems to be a complaint that we hear daily: the no-shows and cancellations are killing the schedule. ‘Our schedule was beautiful until we walked in this morning and listened to the messages, then the appointments fell like dominos.’ I wish that I could tell you that I have a magic button to prevent this from ever happening to you again, however the truth is, no one has such a tool.



There are some steps you can take to decrease the numbers. The most useful we have found include:

- 1- The **verbiage when scheduling** the appointment should include something like: “Mrs. Smith, we have *reserved* Tues, January 8th at 9:30am in our schedule for your next hygiene appointment with Mary.” This same verbiage can be repeated when confirming the appointment. I haven’t mentioned anything about cancelling or changing the time. It’s best not to give them permission ahead of time.
- 2- The **verbiage when cancelling** or rescheduling with less than 24 or 48 hour notice (whatever your office policy is):



“Oh no, I hate to hear that you can’t make your reserved time. Is there any chance of keeping that day or time?”

If not then the next step is crucial in training your patients the value of that reserved time: the next appointment available is 6 weeks out, even if tomorrow is wide open. If you schedule the patient for an appointment tomorrow or the next day, you’ve just taught them that you always have openings and they will continue to cancel last minute.

You may ask them if you can call them in the event that you have a change in your schedule, you can even call them in an hour to offer one of tomorrow’s appointments. However, you want it to be a huge benefit to the patient: “Mrs. Smith, today is your lucky day. Mary just had a change in her schedule for 2:00 tomorrow.” (*This is an area that we always receive push back from offices. We promise that this works.*)

- 3- **Emails, texts and postcards** – when do you send out your confirmation notices to the patients that are scheduled and how? How do you know which is the best method for you patients? Many times, we will hear that patients complain that they receive too many notices – really? - how many patients are actually complaining? I will often hear patients ‘mention’ the number of times they were sent a message, but I have yet to hear a patient ‘complain’. Avoid changing what you do for the masses because of one’s comments. If a patient does mention the several reminders, merely ask which one they prefer, then make the change for that one patient.

When do you send out your reminders? I have found that at least a 2-day digital reminder works well. If the patient hasn't responded the digital method, then phone

calls are made the day before. It gives the office time to fill any of the openings that may occur during the confirmation process.



Today I received an email, voicemail and text from my physician about an appointment I have in 2 days. I responded to all 3, maybe since I'm so aware of the importance, and yet didn't feel bothered receiving all 3.

Finally, I received a 'thank you for confirming' text along with instructions to bring my insurance card, photo ID and a method of payment for my appointment. Do you remind your patients that they may have to make a payment at their appointment?

Finally, there are important steps to take when dealing with those chronic schedule killers. My personal rule of thumb is the number 3: after 3 last minute cancellations or rescheduling during confirmation, I put them on a 'same day only' status. I will even explain it to the patient in this way: "Mrs. Smith, it seems as though our schedules are not in sync with each other. How about if you call me on a day that you know you can come in and I will see if there is time in our schedule?" or the reverse, 'we can call you

when we have time available. Many times the patient will insist, however, I stay firm and let her know that since the last 3 appointments did not work for her schedule, and it was quite inconvenient to our schedule, we should try it this way.

When I suggest this, many offices fear that the patient will go somewhere else. If this patient continues to ruin your perfect schedule, does it really matter?

Taking this thought one step further, I was in an office that had a schedule killer on the books; at the morning huddle, the team took bets on whether she would show. The patient coordinator stated that she spoke with the patient and she confirmed she would be there for her 3:00 appointment; in fact, she mentioned that she had to be out by 3:45 to get her kids from school. As luck would have it, the patient did show up ... at 3:15. She was so apologetic and reminded the team of her time constraint. When the Dr. went in for the hygiene check, he declared her cavity free and all was good. Then he did something that totally took me by surprise: he asked her if she was aware of the dentist right near her neighborhood (he called out the practice name) and she said she did know of it. He mentioned that the dentist is a friend of his and would love to refer her to that office, since it might be more convenient for her. She looked at him wide-eyed and asked, "Are you breaking up with me?" The Dr. nodded and stated that although she had been a long-time patient, and he valued that, her constant no shows and last minute reschedules were detrimental to his schedule. He would prefer to refer her to a dentist he knows at an office that is more convenient to her. She walked out of the office a bit dumbstruck and laughing, with the new dentist's referral in her hands. The team was shocked. The Dr. explained to the team that both sides deserved better and he

felt that this was a step he needed to take. Talk about a powerful message to the team.

One policy that many practices have is to charge a cancellation fee. I am not personally a fan; however, I do hear many times that it is successful in offices. My first question is: Do you collect on the fees charged? About 1/3 of the time is answered in the affirmative. Another method to deter cancellations is to have the patient put a deposit down prior to reserving the appointment time. After all, you have to leave a credit card number prior to scheduling a massage or dinner reservation, is the argument. I'm still not a fan yet, to each his own.



No-shows and last minute cancellations are going to happen, it is the cost of doing business. However, it is the proactive steps that you take in advance that will help to reduce the numbers and the way that you handle the patients afterward that will train your patients the value of their appointments. It is not easy, but it is so important to stand strong and maintain control of your schedule.

If you find that you need guidance in regaining control of your schedule, I would love to help you. Contact me at: Denise@GTSgurus.com.

GLOBAL TEAM SOLUTIONS

redefines traditional practice management consulting by offering the highest quality service through relevant, measurable & sustainable solutions to address all business issues.

With a deep understanding of complex challenges that companies face in the overall business, Global Team Solutions works with practices to improve performance, comply with complex regulations, reduce costs, leverage technology and stimulate growth.

For a company to succeed, the team needs to:

- identify issues
- develop strategies
- have effective communication

Our programs provide:

- ✓ interaction of the whole team
- ✓ skills and tools
- ✓ a customized program; no "off the shelf" programs

Could your practice use our help? info@GTSgurus.com



Global Team Solutions

Practice Management Gurus
Solutions that Work

About the Authors

Denise Ciardello



Denise always knew she wanted to be an entrepreneur. She built her business on the foundation of ethics and principles demonstrated by her father, who owned a successful construction company. Today she is a champion of change, and her clients refer to her as their

Accountability Coach. The best parts of Denise’s job are those moments when clients “get it,” those a-ha moments that can put a practice on the track to serious success. A professional speaker and published author, her enthusiasm and knowledge about the dental profession has helped many dental teams. She brings experience, insight, and creativity into her management style, along with a sense of humor. In a profession that can cause anxiety in some dental employees, Denise’s consulting approach is to partner with doctors and team members to help them realize the dream of creating a thriving, successful practice.

Denise is co-founder of **Global Team Solutions**, a practice management-consulting firm. Along with her talent for business, Denise has gained numerous distinctions in her industry. She is co-author of *OMG! Office Management Guide*, the “bible” used in training workshops. She has served as the president of the Academy of Dental Management Consultants and is a member of the National Speakers Association, the American Association of Dental Practice Administration, Toastmasters International, and Directory of Dental Speakers.

Denise Ciardello
denise@GTSgurus.com
844.OMG.4GTS

Janice Janssen, RDH, CFE

When it comes to working at a dental practice, Janice Janssen has seen and done it all. Since her introduction into the field as a teen, she has worked as a dental hygienist and in other roles including office management, insurance billing, and collections.



As co-founder of Global Team Solutions (GTS), Janice enjoys consulting because it allows her to share her techniques with the doctors, hygienists, and office staff who are on the front line every day. Her zeal for a proven successful periodontal program makes her a real asset to her clients across the country.

She is the current treasurer of the Academy of Dental Management Consultants (ADMC), and is a Certified Fraud Examiner (CFE), which positions her as an expert dental practice fraud and embezzlement.

Janice Janssen
Janice@GTSgurus.com
844.OMG.4GTS

Christopher Ciardello



For Chris Ciardello, the dental industry was a family business. His grandfather was a dentist and his mom had made a successful career out of dental consulting—so Chris joined in and soon realized he loved it.

As a practice management consultant with Global Team Solutions, **Chris Ciardello** is passionate about sharing his expertise in the areas of technology and marketing as it pertains to the dental office. Chris has a distinctive knack for understanding the needs of an office and he communicates those needs to the team, which creates a cohesive, productive atmosphere. Chris's natural rapport with people and his years in the trenches of practice management have helped him excel at Global Team Solutions, which he joined in 2012.

He began his career in dentistry as an office manager after graduating from the University of Texas, San Antonio with a BA in marketing. Chris is a certified Dentrix and Viive trainer and a member of the Academy of Dental Management Consultants.

Chris Ciardello
Chris@GTSgurus.com
844.OMG.4GTS

Cindy Day Hauk

Cindy always knew she wanted a profession where she could help people. As a young receptionist at a dental practice in Branson, Missouri, she found her dentist to be a willing mentor - and the job just clicked. She quickly learned about the many aspects



of working in a practice, and her training in clinical and clerical skills provided all the tools she needed to embark on a lifelong career.

Today, Cindy is passionate about training and consulting for dental practices. She is a former Field Training Manager for Henry Schein Practice Solutions, and is currently a certified trainer for Dentrix, Dentrix Enterprise, and Easy Dental. With more than 15 years of training experience, she excels as a large-group presenter at workshops and seminars. She's excited to be part of the GTS team and share her know-how and knack for practice security, paperless processes, staff management, and productivity.

Cindy Day Hauk
Cindy@GTSgurus.com
844.OMG.4GTS

Products

RISK ANALYSIS & MONITORING (RAM) Program

Maintenance for your Practice's Finances

“The best offense is a good defense.”-Vince Lombardi

Our Risk Analysis and Monitoring (RAM) Program is designed to provide doctors with peace of mind. We provide the assistance every doctor needs to monitor their patient accounts, along with the day to day operations completed by their team.

This is a cumbersome task for many dentists. And, truly, most dentists are not trained on what to look for in their reports and others just simply do not have the time.

Our RAM program offers a deep dive into the inner-workings of their practice to discover inconsistencies and misappropriations, while giving practitioners the ability to monitor their systems and team on an ongoing basis. This is a new level of protection never offered before that will allow any dentist to detect wrong doing sooner than later.

Our RAM program will help dentists across the U.S. save thousands of dollars by making sure the systems they have in place are the most appropriate ones for their practice, and ensuring that their team are implementing them correctly.

Our detailed analysis and monitoring service provides dental practices with valuable information that could indicate the need

for further investigation, giving each practitioner a “does it make sense” analysis of their dental office’s finances.

The goal of our RAM program is to alert dentists as soon as possible of inconsistencies, and make recommendations for “best practices” to create a healthier viewpoint of each office’s operations as a whole.

Practices under our RAM Program will receive monitoring of the practice’s

- Remote login to client’s practice management software
- Audit trail review for the quarter
 - Day sheets/Deposit slips verified with bank statements
- Sampling of Insurance EOBs reviewed for proper entry
- Verification of Credit card transactions
- Time clock entries substantiated (if applicable)
- Verification of Accounts payable (if applicable)

Statistics show that 2/3 of all dental offices will be embezzled in the lifetime of their practice. Our RAM program gives you the opportunity to lessen your chances.

Be **PROACTIVE** and not a **STATISTIC**. Call us today!



Janice Janssen
Janice@GTSgurus.com
844.OMG.4GTS

Office Management Guide® Online Training

OMG! Portal is an online training portal offering a great way to train you and your staff on the in's and out's of running an efficient practice. From scheduling to billing to treatment plans... every single secret that makes every practice successful, now at your fingertips.

Our OMG! Portal is available 24/7 for a yearly fee that includes a monthly brand - new course. Each course is broken down into modules that allow the greatest flexibility and comfort. You can finish each course at once or do it at your own pace.

These courses are perfect for new employees and seasoned professionals! They help turn down time in your office into productive training time, so give your staff the top-notch training they deserve and watch your practice become an efficient well-oiled machine.

Increase your profits implementing our proven systems focused on the following areas:

- ✓ Office management training
- ✓ Recall retention
- ✓ Insurance management
- ✓ Billing and collections
- ✓ Scheduling 101
- ✓ Treatment case presentation

Sign up for a chance to hear from our experts about the steps

you need to take to implement these proven systems and achieve the dental practice of your dreams!

 **Introducing**
OMG! Office Management Guide®
Study Clubs

Do you find yourself asking:

- ✓ "Is my **team** reaching its full potential?"
- ✓ "How's my **recall**?"
- ✓ "Do we schedule to **production**?"
- ✓ "Is my **office** running like a well-oiled machine?"
- ✓ "Where are my **collections**?"

If you answered "yes" to any of the questions above, then the OMG! Office Management Guide® Study Clubs are for you.

Each quarter, we will take deep dives into various office management topics. This 2-hour intensive session will be highly interactive and incredibly informative for all attendees.

Objectives:

- ❖ **Master** practice management
- ❖ **Learn** from experts
- ❖ **Discover** what's working
- ❖ **Create** customized protocols
- ❖ **Implement** immediately

Visit <http://www.GTSOMG.com/> for more information.

Grade YOUR Practice: "A" or Just "Meh"?

**Every dental professional wants a successful practice.
Not everyone knows how to move beyond
"How?" to "Wow!"**

Our GTS speakers can help. With many combined years of dental practice experience, we are eager to share the secrets that can unlock your practice's real potential. And help you achieve every goal—from more efficient processes to greater profitability to happier team members to more satisfied patients.

Find out what GTS speakers can do for your next meeting!

We customize our speaking presentations to deliver specific knowledge and skills to meet your meeting objectives. Our aim is to make the experience rewarding—and fun!—for you and your attendees.

Book our GTS speakers for your next meeting!

844-664-4487

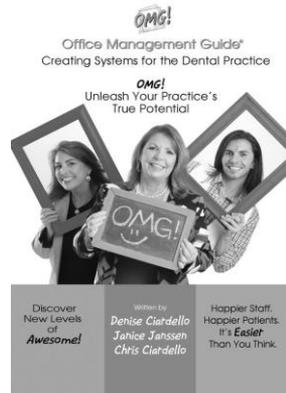
Jory@GTSspeaks.com



BOOKS

OMG! Office Management Guide®

OMG! Office Management Guide® for the Dental Practice is designed to assist anyone working within the administrative area of a dental practice realize the necessity to create efficient system; even the seasoned office manager will develop standardized protocols for all practice management systems in order to successfully manage a dental office.



Office Management Gems!

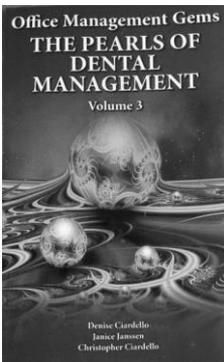
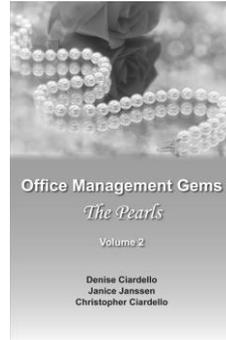


The Pearls – Vol. 1

The beauty of a pearl is its luster & smoothness, which can take 2 to 3 years to form. A dental practice is much like a pearl it takes a continuous commitment to quality, efficiency & attention for detail to exhibit its true value. Dental offices have such unique characteristics and today's practice manager has to stay on top of all aspects of dentistry. A business cannot run efficiently without systems for each and every task. This book is designed to take specific tasks and break them down in order to get a better understanding of what is required to make it work. The tips in this book are here to help you work smarter.

The Pearls – Vol. 2

We are perpetual students and we seem to surround ourselves with people who feel the same way. We often leave a seminar with great ideas that have been brought to the meeting. These ideas spark conversation, knowledge and mental growth.

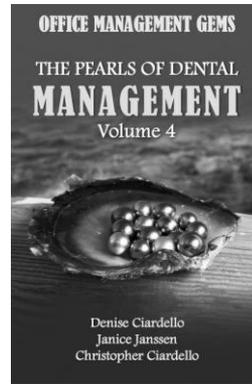


The Pearls of Dental Management – Vol. 3

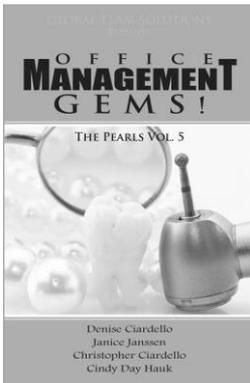
Have you considered all the times that you've gone to a CE class and sat there wondering if you've totally wasted your time? Each time you attend a course, there is probably one little nugget that you bring home with you. Every class doesn't give a pearl and then some classes give you a bucket-full of pearls. This book is designed to give a few pearls that we've picked up along the way. Sometimes it comes from something someone says, does or acts. We work with so many awesome dental teams that inspire us and we want to share that inspiration with you. We hope that you find a pearl or two within the pages of this book.

The Pearls of Dental Management – Vol. 4

Whether you are looking for a new year's resolution, want to learn a little something from Starbucks or are looking for the missing piece...we have it for you here. It may be time to take charge of your schedule or run some valuable reports.



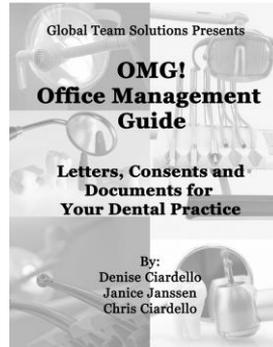
The Pearls of Dental Management – Vol. 5



We have put together a few of our philosophies and recommendations in our Pearls series - this is Volume 5. This book has everything from HIPAA to patient and employee relations. We will help guide you through some of the tough concerns confronting you today. We hope it enlightens your processes and that you gather a few pearls along the way. Enjoy!

"GTS is excellent at presenting valuable information in an engaging, sometimes funny way. I always take away a "pearl" that really makes an impact on me." - P. Erickson

**OMG! Office
Managements Guide®
Letters for Your Dental
Practice**



Do you ever struggle for the right words when creating a letter or document? You want it to be a proper reflection of your practice, however, with the phones ringing and the day-to-day craziness, it's difficult to know what to say. We have the answer for you in the OMG! Office Management Guide – Letters, Consents and Documents for Your Dental Practice.

Areas covered include: Insurance, Collections, Informed Consents, Ortho, Patient Communication and Practice Management. All documents come in a PDF format, which you can customize for your office.

**For more great products, just like these,
visit the Global Team Solutions online store.**

<http://shop.GTSgurus.com/>