

The Office Structure: Shedding Hats

The dilemma encountered by nearly every practitioner is wearing multiple hats. The result is always increased stress...and stress comes about from repeated and continuous demand on the number of “things” the owner has to do, and is responsible for.

Hiring, dismissals, finance of the office, staff compensation, time off, the building, the CPA, payables, payroll, patient chart narratives, entries in charts, equipment purchase, equipment breakdown, office cleaning, scheduling, exams, hygiene checks and on and on.

If the primary dentist (owner) leaves for a couple of weeks the stats drop like a shot duck. The solution is to “race back to the office” or take off less time, or take time off when patients don’t come (Christmas, New Years, Labor Day, Memorial Day, etc.). In short, there’s a pair of “silent handcuffs” that “stick” the primary dentist to the office.

Does one do this until he/she retires?

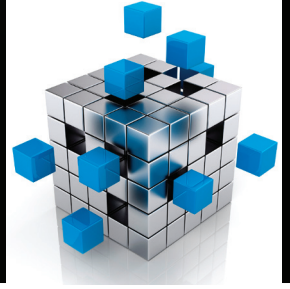
More importantly, the volume and duties that end up on the owner (multiple hats) not only sticks him/her in an operatory day in and day out, but prevent the office from becoming a *true business*.

What is a “true business?” Simply, it is a well organized activity, with systems in place, run by loyal and trusted core personnel—with or without the presence of the owner. Keeping “in-touch” with the office is vital...and always needs an oversight owner to interface with core staff, there is no euphoria or thought of “just let it run,”...that never happens.

In the following pages and diagrams is a description of a simplified structure for the practice...a structure that puts in place functions and *core personnel*. The implementation and success takes some effort, but the end result is far higher freedom and a practice that approaches a “true business.” It brings about a different working environment, a different personal life and most important...more freedom.



Module 2a



Office Structure: Overview & Simplification

Simplification of the office structure is paramount for improvement of two key factors:

1. Delineation of office functions and duties
2. Establishment of core personnel who operate the practice, *with or without the owner*.

An overview and understanding of the importance of the Office Structure and its simplification was developed over years of university MBA research for any small or medium-size business. Foremost, the structure of any enterprise is determined by the functions performed in that business.

To “draw” or “determine” the structure of the practice, prior to precision isolation of the functions performed, is extremely costly as it adds personnel, payroll and complexity to the business. Simplification of written duties and functions in alignment with the functions performed will always reduce overhead, personnel problems and staff turnover. Most dental practice “structures” are copied over the years, from one practitioner, dental architect or supplier...to the next practitioner. Missing functions and administration are enormously costly over the life of the practice, and if functions aren’t “visible,” or “missing,” then how can one see them?

Let’s break down the functions of any dental practice as once these are identified, the structure becomes instantly visible.

What are the functions is must have for growth, expansion and for absentee ownership? It must have:

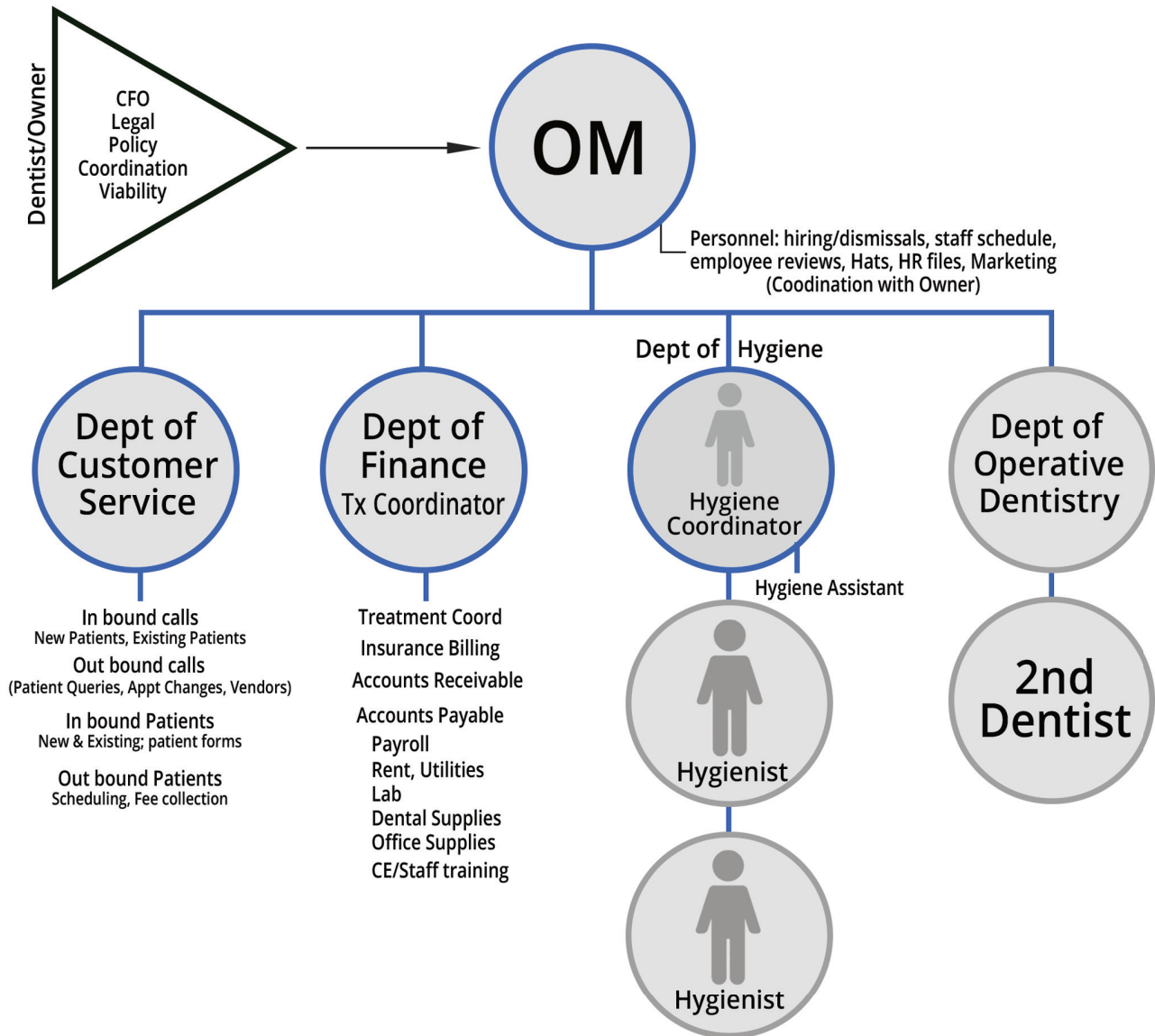
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| A manager | Sales (tx consultation/acceptance) |
| Personnel (administrative & technical) | Accounts receivable |
| Billing (insurance, care credit, etc.) | Accounts Payable (rent, utilities, payroll, etc) |
| Marketing | Legal, tax compliance, insurances |
| Inbound phone calls | Teeth cleanings (new & returning patients) |
| Outbound phone calls | Operative dentistry |
| Inbound customers | Supplies—administrative & dental |
| Outbound customers | Building cleaning & maintenance |

A CFO (chief financial officer) to oversee the growth, expansion and viability of the business



Personnel Control—The Office Structure

Using the *functions* of the practice as covered on the prior page, the structure can be organized and simplified:



○ = Core Personnel



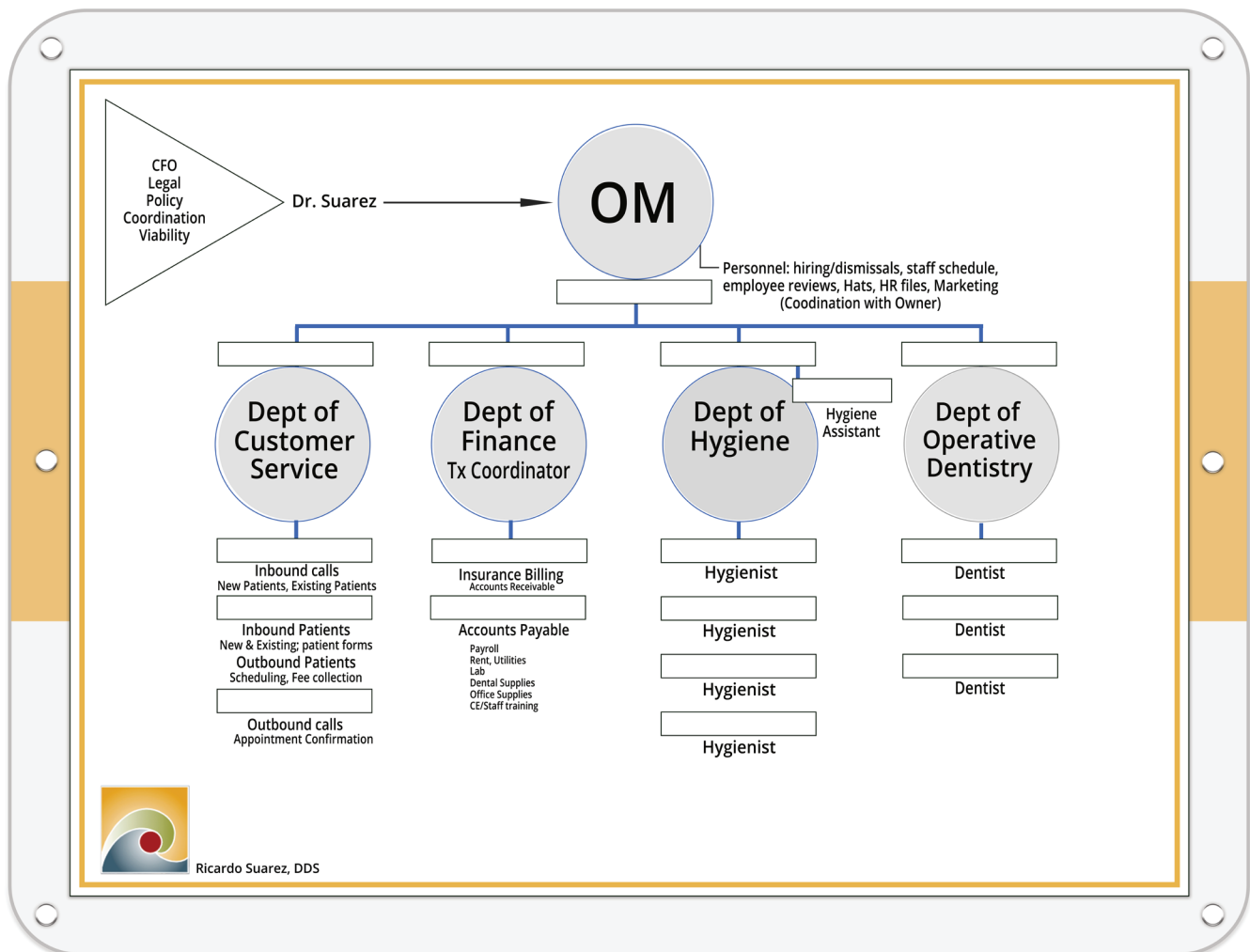
- Office Manager
- Dept of Customer Service
- Tx Coordinator (Finance)
- Hygiene Coordinator



The Office Structure Acrylic Reusable

A key factor in staff stability is knowing and seeing the structure of the office. Call it a business chart, or an organization chart or a "functions chart," but no matter what it's called, it removes confusions and gives stability. The below is a designed Office Structure for your office.

It is made of 3/8" optically clear acrylic: It's size is 48" in width and 36" in height. The "blank boxes" are for entry of staff members names. The chart below is optional. You may already have something similar but this is available. They are manufactured in Canada as Viva has used them and quality is excellent. If you elect to acquire the chart, the cost averages \$350 - \$450 depending on the size. Viva will design and have it shipped to your office. There is no mark-up on this product. If you wish to have it produced locally, our designer will send you the proof for approval and send it to your for use locally.





Module 2d

Empowering the Office Manager

The word “Manager” implies that one can manage and when managing a business the “manager” is held responsible for that business. If we define the word “manager” what would it embrace?

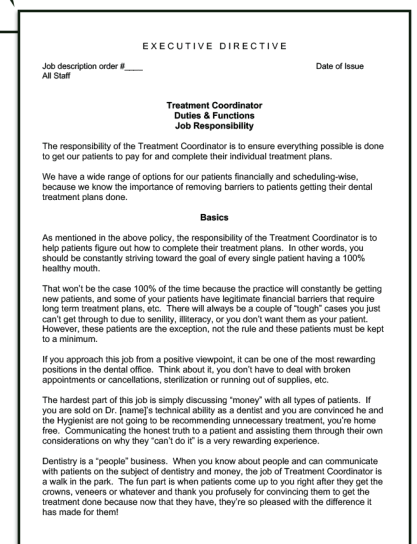
Personnel: Hiring, training, hat write ups, cross-training, annual performance reviews, schedules and working out, vacation time, staff manual, staff interviews for lack of performance and violation of policy, curtailing payroll costs through staggering schedule and eliminating overtime.

The first empowerment is putting in place an “HR” or Human Resources System. The diagram below gives a simple example of “Personnel Files.” The HR files buffer against discrimination suits, invalid unemployment claims, sexual innuendo suits and personal suits to the doctor/owner for “damages”... either “emotional” or “physical.” Such claims hit both the practice and personal finances. Documentation, signed employment agreements, leaving staff waivers, notations for non-performance of duties will eliminate 98% of all such claims.



Personnel Files

Employee duties & functions
Employee signed work agreement



Empower and hold responsible the Office Manager. These “petty details” are near impossible for the dentist/owner to perform and keep up-to-date.

Every personnel file has a checklist of mandated forms. The checklist is simply “checked,” which allows for quarterly or annual inspection by the owner to verify files are up-to-date.



Empowering the OM: The Core Personnel

Training Officer: The primary responsibility and duty of the office manager to perform as a training office! The manager is responsible to train and cross train staff on most all duties in the business. He/she trains each of the core personnel as her first priority (as diagrammed in the structure of the office).

It doesn't mean the OM doesn't perform or do vital functions. He/she will be "in and out" of areas constantly. The strategy however, is to train the core personnel with written duties...to perform the functions in their department.

Once the core personnel are competent on their primary duties, they are then cross trained. This affords lower payroll, higher team-effort and more importantly, when an employee is lost, sick or absent for time off, the other team members pick up the lost functions and perform them.

e.g. Training multiple staff on patient education for procedures diagnosed by the doctor are paramount to improving higher patient care, but more importantly freeing up the doctor's time throughout the day. Every assistance, hygienist and front office personnel should be trained to educate, illustrate and obtain patient acceptance of treatment.

This becomes a *TEAM* activity... and the training is simple...as the doctor's dialogue on every procedure is said and heard over and over and over by assistants, front office personnel...and the **ONLY** reason the majority of staff do not perform education to gain treatment acceptance is because..."it's not their job" or "it's always been the doctor" or the "treatment coordinator,"...and the responsibility is factually taken away from the majority of staff. This is not intentional by any means...it is just a "fixed idea" that has "always been that way."

This doesn't mean the treatment coordinator is not fully responsible for treatment acceptance...he/she is! And every day at the morning "huddle" the team go over the new and returning patients...Hygienist, for example, never begins a cleaning without **FIRST** looking at the chart to determine "what dental work was never done that was diagnosed by the doctor?" The treatment coordinator and hygienist already know this before the patient ever shows up...and they "double-team" to educate and close the treatment...not the doctor. The doctor can be used as an authority if needed, but in actual fact this isn't needed most the time.



Empowering the OM: Continued

Statistics & Reports: The office manager must provide weekly and monthly statistics and reports to the doctor. The implementation of the key stats and reports is covered in Module 3. It's mentioned here as statistics of each core personnel, weekly and monthly...as well as HR reports monthly are supplied to the doctor.

Elevating the Office Manager: Every office is different as the office manager is many times used for treatment acceptance, scheduling, answering the phone, insurance billings and a host of other duties. Elevating means "pull up" ...to focus on the key strategic actions that grow a practice:

Staff huddles each morning...held by the OM
Drives



Module 2f

Structure of the Office Videos

You will receive a link to a portal for the Structure of the office. It is an on-line video portal that will take you through 15 video lessons on the subject. The below describes the videos, which you will see when you login to the portal. You and your staff can watch them at your discretion. There strictly educational.

Removing the Income Ceiling: Office Structure

The "Structure of the Office" is a game-changer. The course teaches why the design of the office "jams" and "constricts" patient flow, new patient conversion and more importantly how the false "set up" of dental practices have been carried over for generations of "copying the prior doctor" or "designer" that has put an income ceiling on most practices in the industry. The bright side is the business solution that breaks open practice growth.

Coaching Clients Only



Curriculum Details



Lessons

15 Lessons



Length

2 Hours, 59 Min



Format

Streaming



THE OFFICE STRUCTURE THE LAWS

1

LAW #1: The goal of a True Business is determined by empowering a trained and stable manager.

2

LAW #2: The “Structure of the Office” clearly delineates responsibility and gives clarity to staff.

3

LAW #3: To achieve greater freedom as the owner there must be Core Personnel in place...this sheds hats from the owner.

The most difficult task for any owner is to “let go of functions” because “he/she can do it better. This continually causes an undermine of the manager and staff as their initiative is lost and the business will hit an income ceiling that frustrates the owner.