Strategic Practice Analysis

YOUR DENTAL PRACTICE

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Report date: January 16, 2013

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Introduction

The Strategic Practice Analysis Report will provide you with a review of the systems and tools currently being used in your practice. Based on my observations as a Strategy Coach, I have included a detailed review of practice management systems that we recommend at The Strategic Alliance Group.

This report includes a systems review covering:

- Preparing for the Day
- Office Communication
- Scheduling
- Customer Service
- The New Patient Process
- Hygiene Department
- Case Acceptance
- Patient Finance
- Insurance
- Leadership

As you read through the report, you will find that I have included a brief description of the system being reviewed. This is to help you understand the impact this system can have on the overall success of your practice. I have also broken each section into three parts.

First you will notice a Performance Score attached to each systems review. Based on a calculation of your practice’s strengths and opportunities, a score is generated. This score is similar to a report card in school. After the completion of our Practice Management Coaching Program, practices will score between 95-100% in each area.

The second part will include observations I made while in your practice that I would consider to be ‘wins’. Continue to reinforce these winning behaviors to your team through regular communication. These strengths should be recognized on a daily and weekly basis. Identifying these to your team will allow them the recognition they are looking for and encourage them to repeat the actions.

The third part of each section will include areas in the office needing further development and refining. These areas can be developed through the implementation of systems, tools, blueprinting and the effective management and leadership of the practice.

As you know, I asked you to complete a Leadership Strengths Assessment based on your self-perceptions. I also had each member of the team complete the assessment and measuring the same strengths relating to you. The analysis of these assessments will be included near the end of this report.
While I was in your office, I had the chance to speak with your team members throughout my visit. I also had each member of your team complete a brief questionnaire comprised of eight questions. I have provided you with the questions they were asked, as well as their responses.

At the conclusion of your Strategic Analysis Practice Report, I have included a Management Summary as well as my overall recommendations. These recommendations are based on my observations and prioritized based on need. As you are well aware, each practice is different. Rather than a ‘cookie cutter approach,’ I want to provide you with customized solutions that will provide an environment conducive to you and your team reaching your practice goals. If you speak with other doctors using the Strategic Practice Management or Marketing Programs, you will notice that no program is delivered exactly the same. Even if you have the same needs; you, your team, and your practice are all very different.

As you read through your report, please feel free to take notes. Many practice owners have found it helpful to keep a highlighter and pen handy. Highlight the parts that stand out to you and jot down notes in the margins of your report. I like to provide doctors with a chance to review this report on their own before we discuss the findings. This allows the doctors to digest the information as well as think of questions they may have for me in our call. For this reason our Post Visit Consultation Call is generally scheduled one week out.
Preparing For the Day

Preparation is a necessary ingredient for success. It has been said, ‘If you fail to plan, you are planning to fail.’ Simply put, in order to have a successful day in the practice, it has to be planned and communicated to the team. This allows the team to be on the same page throughout the day. Planning provides an opportunity to forecast the day and help us better adapt to the unknown as it occurs.

Performance Score

PREPARING FOR THE DAY PERFORMANCE SCORE

Strengths
- This section will outline strengths specific to your office and team

Opportunities
- This section will outline opportunities and recommendations specific to your office and team
Office Communication

Communication can make or break a practice. Communication is taking place in your office as soon as the first person arrives for the day. Just because people do not speak to one another, it does not mean communication isn’t taking place. Communication can be verbal or non-verbal. It can be positive or negative. It can be proactive or reactive. Communication is based on perceptions that individuals have built over time.

With your practice made up of different individuals; all with different backgrounds, cultures, perceptions, age groups, and even genders, it is highly important that communication is proactive.

Performance Score

OFFICE COMMUNICATION PERFORMANCE SCORE

Strengths

- This section will outline strengths specific to your office and team.

Opportunities

- This section will outline opportunities and recommendations specific to your team
Scheduling

The schedule affects every aspect of the office. A successful day and an unsuccessful day can both be linked to the office schedule. The schedule determines when patients arrive, when patients leave and impacts the experience they have in your practice. The schedule determines the type of treatment and length of time allotted for the treatment. With this being said, the schedule is something we should work to control, but all too often that control is placed in the hands of patients with seven words: “When would you like to schedule that?” Instead, the practice needs to own the responsibility for directing patients.

Performance Score

SCHEDULE PERFORMANCE SCORE

Strengths
- This section will outline strengths specific to your office and team

Opportunities
- This section will outline opportunities and recommendations specific to your office and team
Customer Service

Customer service is a term that has lost meaning and value over time. The reason is companies, specifically the service industry, have thrown the term around loosely in effort to communicate ‘we care’. The truth is, many don’t care. They use it to market. ‘Customer Service’ alone simply defines service is being provided. It doesn’t specifically say what kind of service is being delivered. If a patient has a bad experience, they can find another provider. There is a lot of competition out there. The truth is, if a patient is simply ‘satisfied’, he/she can find another provider as well. Loyalty is only earned, when the patient has a level of service that exceeds the expectations.

Performance Score

CUSTOMER SERVICE PERFORMANCE SCORE

Strengths
- This section will outline strengths specific to your office and team

Opportunities
- This section will outline opportunities and recommendations specific to your office and team
The New Patient

The ‘New Patient’ is the lifeblood of the practice. However, bringing in new patients is not enough to allow the practice to grow. True growth only occurs when that new patient schedules and keeps their next appointment. The new patient process starts with their very first contact with the office and truly never ends. Typically, the first contact is a phone call. The goal of the practice, all team members included, is to provide an experience which exceeds their expectations. Only at that time does the patient begin to identify value, perform a mental cost-benefit analysis and make a decision.

Performance Score

THE NEW PATIENT PERFORMANCE SCORE

Strengths
- This section will outline strengths specific to your office and team

Opportunities
- This section will outline opportunities and recommendations specific to your office and team
Hygiene

The Hygiene Department is an important part of the practice. Many times, when a ‘new patient’ calls the practice, the patient requests to schedule an appointment with the hygienist vs. the doctor. However, the hygienist has a very important role in oral healthcare beyond a ‘cleaning’. Typically a compliant patient will spend more time with the hygienist over the years than the doctor. With this in mind, the ‘expanded’ role of the hygienist is crucial in establishing a long term compliant patient and building value through education.

Performance Score

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<td><strong>Strengths</strong></td>
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<td>3%</td>
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<td><strong>Opportunities</strong></td>
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Strengths

- This section will outline strengths specific to your office and team

Opportunities

- This section will outline opportunities and recommendations specific to your office and team
Case Acceptance

Dentistry is a business. A great business! Oral healthcare is very important. Studies have shown there are links between an individual’s oral health and systematic health; even heart health! This is a business that simply put, provides a service in exchange for money. That, in fact is the definition of ‘sales’. The exchange of service or good for money. For reasons of greed however, the term ‘sales’ has taken on a negative connotation and some people cringe at just the thought. Case Acceptance is sales in dentistry. In order for a patient to accept treatment he/she has to understand the value of the treatment. Creating value for case acceptance happens at every interaction with the practice and the team.

Performance Score

CASE ACCEPTANCE PERFORMANCE SCORE

Strengths
- This section will outline strengths specific to your office and team

Opportunities
- This section will outline opportunities and recommendations specific to your office and team
Patient Finance

When people receive a good or service they know there is a price. When someone goes shopping, items are placed in a basket with the understanding ‘I am going to pay for this as I leave’. At checkout the person doesn’t say ‘bill me later’ or ‘I forgot my wallet’. Payment is made, in full, and the customer leaves happy. This should be the same process in the practice. Proactive patient education regarding patient finance will make this transition painless and allow the patient to decrease outstanding accounts receivable balances.

Performance Score

PATIENT FINANCE PERFORMANCE SCORE

Strengths
- This section will outline strengths specific to your office and team

Opportunities
- This section will outline opportunities and recommendations specific to your office and team
Insurance

The medical field has trained patients to a certain level of expectations in regards to many components of the visit, including ‘insurance’. However, the reality is dental ‘insurance’ and medical insurance are very different programs. Understanding and being able to explain these differences to the patient is vital. Only when the patient understands and accepts these differences, can the practice begin to manage perceptions and change behavior.

Performance Score

INSURANCE PERFORMANCE SCORE

- **Strengths**: 14%
- **Opportunities**: 86%

**Strengths**
- This section will outline strengths specific to your office and team

**Opportunities**
- This section will outline opportunities and recommendations specific to your office and team
Strategic Leadership

Management and Leadership are two completely different verbs. Both are calls to action, but different type of action. The team will look to the doctor as both the manager and the leader depending on the situation. To build the practice, create a positive environment and develop the patient experience, the doctor must step up as a ‘strategic leader’. There are different stages of leadership and different hats must be worn for the different stages. Knowing when and how to lead will empower the doctor and the team.

Performance Score

**STRATEGIC LEADERSHIP PERFORMANCE SCORE**

- **Opportunities 100%**
- **Strengths 0%**

**Strengths**
- This section will outline strengths specific to your office and team

**Opportunities**
- This section will outline opportunities and recommendations specific to your office and team
Team Member Questionnaires

During my visit to your practice, I spoke with each employee and went over a total of 8 questions pertaining to their perceptions of the practice. Each team member was ‘interviewed’ in person. The questions asked of your employees are below. Each of their answers will be followed by number. Please note, that these have been randomized. This means that all #1 responses are not from the same team member.

When reading the answers, many times the first thing to come to mind is ‘who said that?!’ and become defensive. This is natural. There is a reason for this section of your Analysis Report. The perceptions of your team are important. Just because members of your team may have a set of perceptions, reality can be different. There are always three sides: the doctor’s perception, the team member’s perception and reality. Knowing the perceptions of the employees does not mean reality is the same. It does, however, provide the opportunity for a leader to find ways of successfully managing perceptions. Over the course of a Strategic Practice Management Program your Certified Strategy Coach will work with you to assist you in creating reality by managing team and individual perceptions.
Leadership Strengths Assessment

Perceptions, to many people, are reality. As a leader, it is very important to understand how your team is perceiving you as a leader. This understanding can prove valuable by helping you understand how your message is being delivered to the team as a whole, and individuals within the team. Knowing this will give you the ability to change the delivery of your message. As a result, you will gain the ability of shaping perceptions and in effect, change the state of reality in your practice.

Communication is multi-layered. The actual words used, tone of voice, body language and environment all have an effect on delivery. This can be negative or positive depending on the different components.

During the Strategic Practice Analysis, you were provided with a Leadership Strengths Assessment and asked to rate yourself in 20 areas. Your team was given a similar assessment and asked to rate their perceptions of you in the same areas. Following, you will find what is considered a ‘gap analysis’ of perceptions. It will show your score, as well as the combined average score of the team. You will see a third column showing the differences. If it is a positive number, it means your team rated you higher than you rated yourself in that specific area. If the number is negative, the team rated you lower than you rated yourself. Don’t get too caught up in differences of .25 or less. This would be inside the range of acceptance. If the difference is .25 or more, either negative or positive, consideration needs to be taken.

If the gap is positive .5 or greater, you are probably being a little too self-critical, or your team doesn’t have a full understanding of the question or your role.

If the gap is negative .5 or greater, consider the message you are delivering. Is the ‘why’ being communicated? How is the ‘why’ being communicated? Does the team have a full understanding of the area?

Your Strategy Coach will be able to assist you in management perceptions over the course of the program. Over time, this could be an appropriate assessment to have delivered a second time. This would be a good assessment of your ability to manage perceptions. However, most perceptions cannot be changed overnight. It takes time to effectively manage change. Your Strategy Coach will be taking these into consideration while assisting you with this throughout the introduction of different modules.