



Tracking Your Practice Productivity

Six Steps to Higher Productivity with Dentrix.

DENTRIX



About the Author

Tammy McHood is a senior product manager for Henry Schein Practice Solutions. She has an MBA from Brigham Young University and 20 years of experience in dental practice management. Tammy led development of the Dentrrix Practice Advisor Report, the Dentrrix Daily Huddle Report, and the Dentrrix Profitability Coaching Program. She is passionate about helping dental practices succeed by maximizing best practices with the tools in Dentrrix.

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'What's Measured Improves'

If you can't measure it, you can't improve it

Business management guru Peter Drucker is often quoted as saying, "What's measured improves." He's also quoted as saying, "If you can't measure it, you can't improve it."

Either way, measurement is the key to improvement—whether in your health, your personal goals or your practice productivity.

Dentrix practice management software includes business tools to help you measure and track the productivity of your dental practice. These measurements can help you make improvements and achieve your financial goals.

In this eBook, you'll learn six steps to tracking (and therefore improving) your productivity with Dentrix. There's nothing else you need to buy, no special app you have to download. The keys to higher productivity are already included in Dentrix.

The first three steps discuss the Dentrix Practice Advisor Report, a powerful business reporting tool you can use to measure five important areas of your practice:

- Production and case acceptance
- Collections
- Schedule management
- Continuing care/Hygiene
- New patient analysis.

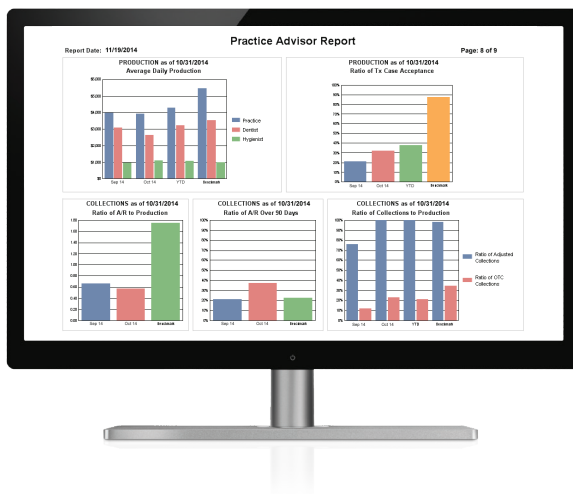
You can run the Practice Advisor Report monthly or for any date range you need to check your productivity numbers.

The next three steps discuss another powerful business tool, the Dentrix Daily Huddle Report, and how you can use daily briefings to lead your team to higher levels of work performance, patient satisfaction and practice productivity.

Let's get started!

Dentrix Practice Advisor Report

Your Most Important Numbers



Step 1: What to Measure

Your most important numbers (as far as productivity goes) are automatically gathered for you by Dentrix. It compiles your production and collections data into one easy-to-read report that gives you a better understanding of your practice's strengths, weaknesses and opportunities for improvement.

The Dentrix Practice Advisor Report compares your practice's data to industry or customized benchmarks, so you can see how your practice is performing. For example, you can compare your practice against the average solo general practice, or against your own practice's goals.

Dentrix tracks and reports key performance indicators (KPIs) from all areas of your practice, including:

- Active patient base
- Hygiene and doctor production
- Schedule management
- Case acceptance
- Collections
- New patients.

Advisor Tips

Hygiene Production

Keep a close eye on hygiene production, because it forecasts the future of your practice's productivity.

The number of active patients in continuing care/hygiene is essentially the number of active patients who will visit your practice in the next 12 months.

Hygiene production is the primary source of growth and production for the doctor. **About 80 percent of the doctor's production comes from hygiene**, so any decline in hygiene appointments directly affects your bottom line.

A declining number of active patients in hygiene is an early warning that you're not meeting your productivity goals.

Run the Dentrix Practice Advisor Report monthly to see your hygiene production for the previous month, current month, and year-to-date.

Dentrix Practice Advisor Report

Your Most Important Numbers

Step 2: When to Measure

Check your numbers as frequently as needed. In Dentrix, you can run the Practice Advisor Report for any date range to see the history and progress of your productivity.

Many practices run the report monthly and share the results with their teams, so everyone can focus on the same long-term goals.

Dentrix includes a special Daily Huddle Report (more about that in Step 4) that shows your daily progress toward monthly goals.

Step 3: How to Improve

Make data-driven decisions to improve your productivity. Review the Dentrix Practice Advisor Report and see where your production numbers are declining or falling below the benchmark.

For **declining production** numbers:

- Look for ways to raise hygiene production, which leads to higher doctor production.
- Brainstorm with your team ways to improve case acceptance, scheduling and new patient referrals.
- Organize your schedule for greater efficiency by pre-blocking time for certain procedures, emergencies and new patients.
- Reach out to inactive patients and “no-shows” to encourage new appointments.
- Create “ASAP” and “Open” lists for patients you can call at the last minute to fill schedule gaps.

For **below-benchmark** numbers, read the advice associated with each alert icon in the Variance column of your Practice Advisor Report. These alerts contain practical advice from industry experts about improving any metric that falls below the benchmark.

Advisor Tips

Schedule Management

The Dentrix Practice Advisor Report shows how your schedule affects your profits. You can see your:

- Average hourly production
- Production by procedure
- Unfilled hours
- Number of broken appointments not reappointed
- Revenue lost from broken appointments

To improve your productivity, you don't necessarily need to work more hours; you just need to see more patients per hour.

The Practice Advisor Report can help you:

- Schedule more intelligently, allowing you to see more patients per hour
- Determine the best times of day to schedule the most productive procedures
- Discover how much revenue you lost from broken appointments

Dentrix Daily Huddle Report

Plan For a More Productive Day

Step 4: Why to Meet Daily

Dentrix includes a Daily Huddle Report to help you **plan for a more productive day**.

Meeting before the workday begins helps the entire team:

- Focus on productivity, patient satisfaction and financial success.
- Anticipate special needs for patients, schedules and procedures.
- Discuss contingency plans before a problem occurs.
- Alleviate stress and confusion while maximizing your productivity.

The Dentrix Daily Huddle Report lists new patients coming in that day, patients with family members without a future appointment, overdue accounts, unscheduled treatments, overdue continuing care and other alerts to help your team prepare for seeing the day's patients.

Daily Huddle Report
Daily Huddle Summary
Today is: 11/12/2014 Page: 2 of 54

Appointment Day Note:
This is a note to remind everyone to work on filling the schedule for next week. And it is Tina's birthday and Joy will be out of the office the whole week.

PRODUCTION	Completed Prior Day	Scheduled Today	Completed MTD	Scheduled Rem Month	Total	MTD Goal
Dentist Completed/Scheduled	13,284.00	8,638.00	135,197.00	96,798.00	231,995.00	328,000.00
Hygienist Completed/Scheduled	5,104.00	3,475.00	31,530.00	38,891.00	71,421.00	100,080.00
Total Production Completed/Scheduled	18,388.00	12,113.00	166,727.00	136,689.00	303,416.00	428,080.00

COLLECTIONS	Prior Day	%	MTD	%
Collections (% Production)	16,394.96	89%	131,205.29	79%

CASE ACCEPTANCE

Spending just 10 minutes reviewing the Daily Huddle Report saves the average practice 60 to 90 minutes a day.

According to Amy Morgan, CEO of the Pride Institute, "The most effective teams not only meet at the beginning of the day, but collaborate and make a specific checklist that answers all the key questions and involves everyone. There is no better solution to organizing the chaos and confusion."

Huddle Tips

Daily Readiness

The Dentrix Daily Huddle Report helps you take advantage of opportunities as they arise, such as discussing treatment, appointment or account concerns face-to-face with your patients.

Dr. Matthew Krieger, CEO of Million Dollar PPO, offers these daily briefing tips:

- Designate one team member to prepare and review the Daily Huddle Report prior to the briefing.
- Present the report within the first minute of the meeting, spending no more than three or four minutes to recap the previous day.
- Review yesterday, today and tomorrow. Spend the most discussion time on today's schedule.
- "Having a clear understanding of every patient appointed will allow you to maximize the flow of your day and reduce your stress," he says.

Dentrix Daily Huddle Report

Plan For a More Productive Day

Step 5: What to Discuss

Expect the unexpected when you look at the day's appointment schedule. However, a productive daily briefing is much more than a schedule review.

Lois Banta, CEO of Banda Consulting, recommends following a specific agenda each day. *"Create a list of topics to discuss, including all areas of the dental practice. Use the Dentrix Daily Huddle Report for a quick snapshot on how the practice did yesterday, what today is looking like, and how the rest of the month is forecasting. This allows you to see, on a daily basis, how you are progressing toward your monthly goals,"* she advises.

Making steady progress each day reduces end-of-the-month panic and increases goal achievement.

Step 6: Who to Involve

Everyone can contribute to the success of your daily team briefing.

The Dentrix Daily Huddle Report makes it easy to take turns discussing responsibilities and priorities with your team. Each team member, including the doctor(s), has a specific role in the briefing.

For example, a hygienist can discuss overdue continuing care, family members without a future appointment or unscheduled treatment in the upcoming day's visits. A financial coordinator can discuss overdue balances, any insurance ineligibilities or patients without insurance who are coming in that day.

The Daily Huddle Report can be generated and saved with each team member's preferences, making it easier to prepare for the next briefing.

Huddle Tips

Daily Strategies

Best practices for daily briefings include these strategies:

- Assign specific tasks to each team member.
- Review the appropriate charts and reports prior to the briefing.
- Allow at least five minutes prep time before the briefing begins.
- Meet where the entire team can see the Daily Huddle Report displayed on a monitor.
- Discuss yesterday's wins and today's goals.
- Prioritize the day's activities and make adjustments if needed.
- Be sure everyone knows their daily and monthly responsibilities.
- Start and finish on time.
- Wrap up the briefing five minutes before the start of the day to allow the team to create a final checklist before the first patient is treated.
- Elect someone to facilitate the briefing and keep track of action items.

'The Simple Act'

Improving Productivity



Business management expert Tom Peters says, *"The simple act of paying positive attention to people has a great deal to do with productivity."*

Recognizing team members daily for their efforts, seeking input from your team, working together to solve problems and improve processes—all are ways to improve the productivity of your practice.

Dentrix makes it easier to improve productivity with a two-pronged approach:

1. Run the Dentrix Practice Advisor Report at least monthly and share the results with your team.
2. Hold daily briefings and use the Dentrix Daily Huddle Report to recognize wins and plan for the day ahead.

For more information about Dentrix Practice Management Software, visit [Dentrix.com](https://www.dentrix.com) or call **1.800.Dentrix**.

Practice Management Software for Greater Productivity

Daily Huddle Report
Daily Huddle Summary

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COLLECTIONS	Prior Day	%	MTD	%
Collections (% Production)	16,394.96	89%	13,1205.29	79%

CASE ACCEPTANCE	Prior Day	MTD
Amount of Treatment Diagnosed	30,038.00	299,936.00
Amount of Treatment Accepted	9,210.00	74,192.00

NEW PATIENTS	Seen Prior Day	Scheduled Today	Seen MTD	Scheduled Rem Month	Total	%
# of New Patients Seen/Scheduled	7	12	46	25	71	100%
# of New Patients Referred BY Patient	2	2	4	5	9	13%
# of New Patients Referred BY Doctor/Person	2	0	8	1	9	13%
# of New Patients Referred BY Marketing	1	2	13	4	17	24%
# of New Patients Referred BY all	5	4	25	10	35	49%

SCHEDULING	Prior Day	Today	MTD	Scheduled	Total
# of Patients Seen/Scheduled	75	94	526	773	1,299

Dentrix provides software solutions for greater productivity and profitability in your practice. That's why more than 35,000 dental practices rely on Dentrix today.

- For greater practice productivity, Dentrix includes full-featured charting, treatment planning, scheduling tools, integrated eServices, digital imaging integration and other tools for a paperless practice.
- For greater business profitability, Dentrix includes financial analytics, accounting and billing tools, marketing and communications eServices, training seminars, user conferences, profitability coaching, mobile access tools and more.
- For continued growth and innovation, Dentrix Connected partners offer the latest in dental products and services – all tested and certified to run smoothly with your Dentrix system.

For 25 years, Dentrix has been helping dentists improve patient care, increase team productivity and grow their practices. Only Dentrix offers hundreds of compatible solutions from our dental technology partners. And, only Dentrix is backed by Henry Schein, the most respected solution provider to office-based healthcare practitioners worldwide.

