Annual Planning: Share Your Vision with the Team

As the year begins, we once again find the annual evaluation time lurking just around the corner—time to scrutinize the past year’s performance of the practice and the team. Looking at where we’ve been, determining where we want to go, and reaching our projected target stand out as three essential elements to accomplish this goal. The necessary requirements of time and commitment must be juggled into an already tight schedule to attain this desirable blueprint for organization and action, which will ultimately yield a great deal of satisfaction.

It has often been said that people seldom plan to fail, but often fail to plan. Many doctors and teams start without a growth or success plan for the coming year. Occasionally, I find doctors do plan for the upcoming year, but fail to inform or share that goal or vision with the team. A team without a finish line in sight cannot help you reach your goals. The main objective of the annual planning session is to help the team review the accomplishments of the ending year and plan for next year’s growth.

The following are a few simple steps to assist in your successful planning for the New Year and your goals for your practice:

#1. Set up a time well in advance for the entire team to meet.
Usually an all-day affair, the meeting is better held in an environment away from the office. This allows the staff more comfort and freedom from distractions. With quick access to refreshments, which tend to help participants’ concentration, a hotel meeting room or a club room works well. And yes, Doctor, this is on office time and usually during the first week of the new year.

#2. Everyone on the team is expected to participate in this session.
Having only your full-time staff sends the wrong message that part-time help doesn’t really contribute much to the success of the practice. Planning well in advance will facilitate the attendance of most participants. The key to success in this planning and follow-up comes from the staff feeling that they “own” the options that are being put into practice.

#3. Be prepared!
Ask everyone to fill out a questionnaire that includes the following:
• What is the greatest achievement by the team this year?
• What has been the greatest challenge the team has faced this year?
• In what way have you improved your ability to give excellent patient care?
• If you could change two things in the practice to enhance the health of the patients, the health of your relationships with other team members, and/or the health of the practice, what would they be?

Print all the year-to-date vital signs of the practice. Include the following: productivity, cash flow, treatment acceptance, new patients and the overall operating expense of the practice.

#4. Start the meeting with a celebration.
Mention accomplishments and give recognition of a job well done. This could be acknowledging extraordinary teamwork employed in reaching a particular practice goal or simple praise of an individual staff member who showed personal growth. Give your team members an opportunity to fill out appreciation slips when they want to recognize accomplishments of their fellow workers. These slips can be saved throughout the year, either being placed in a sealed envelope or locked suggestion box.
#5. Review your Practice Mission and Philosophy statement.
Ask yourself the following questions:
- Has anything changed this year in your vision for the practice?
- Are you practicing the way you’ve envisioned?
- Is your referral base of general dentists strong, and will they continue to send good patients?
- Are the new patients you attract the type that you’d like to keep and the type that will help you build the practice?
- Does the staff fully understand and share your practice philosophy?

#6. Review your past, plan your future.
Evaluate the vital statistics from the previous year, establish new goals, and plan what action is needed to accomplish them. As you begin the goal setting process, keep in mind the purpose of establishing objectives is focusing attention and providing general direction. Start by setting SMART goals.

Specific – Is it focused?
Measurable – Can you tell if it is accomplished?
Attainable – Is it a realistic target?
Relevant – Is it a priority?
Trackable – Can the results be compared over time?

For a goal to be successful, it must be generally accepted by the staff and adequately communicated. For this reason it is critical to involve everyone on the team.

Take a look at each doctor’s hourly and daily productivity. Which fees need to be increased and by how much? Will you add any new procedures next year?

Is the cash flow healthy? Are you collecting 98% of what you produce? Do you have a variety of payment options from which patients may choose?

Take a look at the number of new patients you are attracting. Are the referral sources solid and consistent? Are these patients saying “Yes” to treatment? What methods are being used to thank referral sources? Set up a log, either manual or computer generated, to track the number of new patients being referred by each source. Also, track the patient value per source.

As you evaluate this each year, it will help you decide the appropriate course of action in order to increase the numbers.

#7. Focus on your team.
Because the team is the greatest asset of the practice, we need to constantly review the strengths, the areas that need improvement, and the action steps each person needs to take to be the best he/she can be. Consider these characteristics of healthy team members:

Responsible
Accountable
Loyal
Problem solvers
Good communicators (with patients and team)

Have the team answer these questions:

What are the strengths of our team?
In which area would you like to see the team improve?

#8. Consider expenses.
Next, using your operating statement for the year, look at the major expenses of your practice: total employee expense, facility, laboratory, dental supplies and practice promotion. How do they compare to the previous year? Project next year’s expenses by using cash flow anticipated for the new year.

#9. Look at your leadership skills.
Think about how they can be improved to help you unleash staff potential. What is the most significant leadership challenge you have faced this year? In what areas have your leadership skills improved? You may want to use a Leadership Checklist to help you determine the direction you will need to take for the coming year.

Leadership Checklist:
- Use Practice Philosophy when making decisions
- Set clear expectations for staff
- Inspect what you expect of staff
- Give positive feedback frequently
- Reward the staff for a job well done
- Keep the team’s adopted Code of Ethics or Conduct
- Practice good listening skills
- Share production and collection information with the team
- Use benefit statements when talking with the staff
- Encourage continuing education growth for staff
- Take time out to train staff
- Discuss corrective feedback in private
- Go over corrective feedback within 24 hours
- Let the staff know your leadership style
- Make decisions based on the financial numbers of the practice
Developing a plan and putting this plan into effect will allow you to work smarter and not harder.

So, now you have your plan, and as you work your plan, don’t forget to stop and celebrate as you reach the quarterly goals. Design fun ways to reward the staff’s hard work and dedication. Remember to enjoy the process and reward yourself!

By Betsy Wheat
Betsy Wheat provides customized consulting services and training programs for the dental profession. Please visit her Web site for more information, www.betsywheat.com.

Save the dates for these AAOMS offerings:

**Practice Management Stand-Alone Meeting**
Strategies to Expand Your Dental Implant Practice  
May 6, 2006  
Nashville, TN

**Coding Workshop: Beyond the Basics**
May 7-8, 2006  
Nashville, TN

**Coding Workshop: Beyond the Basics**  
October 4-5, 2006  
San Diego, CA

**Coding Workshop: Beyond the Basics**  
November 12-13, 2006  
Coral Gables, FL

This is number 92 in a series of articles on practice management and marketing for oral and maxillofacial surgeons developed under the auspices of the Committee on Practice Management & Professional and Allied Staff (Brent T. Garrison, Chair, Robert W. Emery, John E. Feeney, Jerry L. Halpern, Rickey L. Hurst, Keith E. Krueger, Donald P. Lewis, Richard C. Robert, Robert T. Watts, Jr., Robert L. Coles, Consultant) and AAOMS staff. Complete sets of previously published *Practice Management Notes* are available online at aaoms.org.

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AAOMS Invites You to Attend a Special One-Day Stand-Alone Meeting

Strategies to Expand Your Dental Implant Practice
A unique blueprint for the successful implant practice from both the restorative and surgical perspectives

Presented by
Stuart L. Graves, DDS, MS and Brian A. Mahler, DDS

Saturday, May 6, 2006
Nashville, TN

Who Should Attend?
OMSs, Residents, Practice Managers, Implant Coordinators and Business Staff

Topics Addressed:
- Economics of the Modern Oral and Maxillofacial Surgery Practice
- Simple Solutions to Everyday Complications
- Effective Consultations—Restorative and Oral and Maxillofacial Surgery?
- Case Diagnosis and Treatment Planning
- Developing Your Implant Team
- Systematically Analyzing Your Referral Base
- Applying Marketing Strategies
- Why Restorative Doctors Choose One Surgical Specialist over Another
- Implant vs. Conventional Dentistry—Which Is More Profitable?
- Positioning Your Practice for the Future

After taking this course, participants should be able to:
- Explain why restorative dentists tend to refer to only certain surgeons for dental implants.
- Demonstrate how much more profitable and rewarding implant dentistry can be to the restorative dentist when compared to conventional dentistry.
- Determine why it is more profitable for the general practitioner and prosthodontist to restore implants, not place them.
- Describe how a close working relationship between a restorative dentist and a surgeon can enhance both the number and success of implant cases.

Your Speakers:
Stuart L. Graves, DDS, MS—Oral and Maxillofacial Surgeon
Dr. Graves has published on implant dentistry and currently lectures both nationally and internationally on dental implants. Dr. Graves is past president of the Mid-Atlantic Society of Oral and Maxillofacial Surgery, past president of the Implant Society of Northern Virginia, Diplomate of the American Board of Oral and Maxillofacial Surgery, and active in the Academy of Osseointegration. He is currently on editorial staff of JOMI. Dr. Graves maintains a private practice in Burke and Reston, Virginia, where over half of his practice is dedicated to implant dentistry. Last year he placed over twelve hundred implants.

Brian A. Mahler, DDS—Prosthodontist
Dr. Mahler has been in private practice in Fairfax, Virginia since 1979. His practice is limited to the specialty of prosthodontics. He graduated from the Medical College of Virginia, completed a general practice residency at Sinai Hospital of Baltimore, Maryland and he received his certificate in prosthodontics at Emory University in Atlanta, Georgia. Dr. Mahler has lectured both nationally and internationally on implant dentistry. Approximately seventy percent of his practice involves the restoration of dental implants. He has consulted, taught and lectured for numerous implant companies over the years. Dr. Mahler is an active member of the American Dental Association, American College of Prosthodontics and the Academy of Osseointegration.

For more information, please visit the Practice Management pages of www.aaoms.org or call Beth Hayson, practice management staff associate, at 800/822-6637 ext. 4357.