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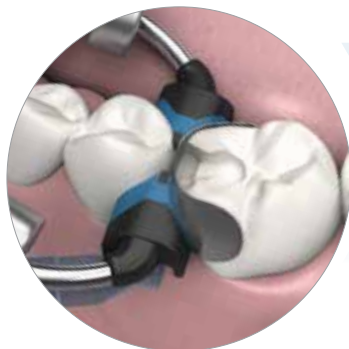
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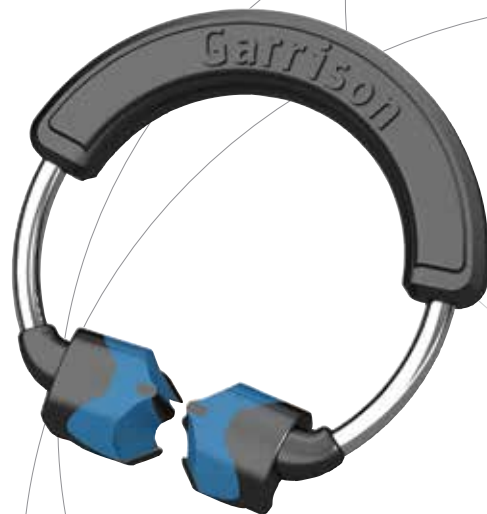
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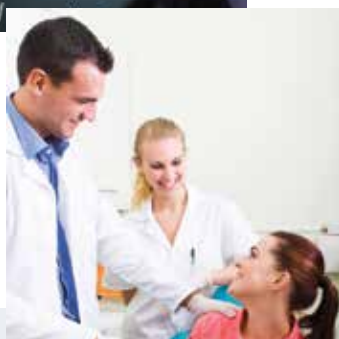


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Welcome to Efficiency In Group Practice



FROM BILL,

In my seven years as a manufacturer sales rep with Coltene Whaledent, the majority of my time was in the field co-traveling with dealer reps as they visited their dental customers. The dealer rep and I had a partnership. They brought me into their accounts as an expert on my products and services. They would give me an idea of what a practice's needs were and I figured out what products I had that would help address

those needs. We worked together; not only to sell more "stuff" to these practices, but also to make sure what we were selling had a positive impact on practice.

Writing this column I started to look at all of the different partnerships that exist in a group setting.

Practice – Dealer partnership – The dealer can provide many things beyond great pricing and on time delivery. They can help you determine what new products are beneficial for your growing group. They are not just order takers; dealers can be a fantastic source for information and education. They can also help you monitor your territory's buying habits.

Practice – Manufacturer/Service partnership – If you are looking to make a product, technology or service change, you should evaluate several manufacturers. Once a decision is made and you bring this new product or service into the group, make sure you leverage the manufacturer or service provider as a resource. Rolling out a new product or service to 10 offices or 300 offices can be a challenge. If it makes sense and the company can do it, have their reps come out and educate your individual locations. Another option is a webinar, which can help educate your teams live and "on demand".

Other types of partnerships within a group setting-

Group (corporate) – Group (individual location) – What is your corporate office's relationship with your individual locations? How do they view corporate? Is this a partnership?

Group – Community – As a corporation, a group practice has an obligation to give back to the community it services. Are you as a group doing something for your community?

Group – Patient – This may be the most important partnership. Without the patient, you don't exist.

The value of your partnerships should never be taken for granted. We hope we're able to help you enhance your partnerships in a way that encourages growth and success.

Partnering with you and your group,

Bill Neumann
Publisher



FROM BONNIE,

There is a long list of skills and strengths necessary to effectively manage a group practice like yours. Maintaining the ideal environment to consistently create a positive experience for your patients is a delicate balancing act every day. Effective communication between the doctors, team members and patients is critical. The expertise of the clinical team, friendliness and efficiency of the administrative team, and

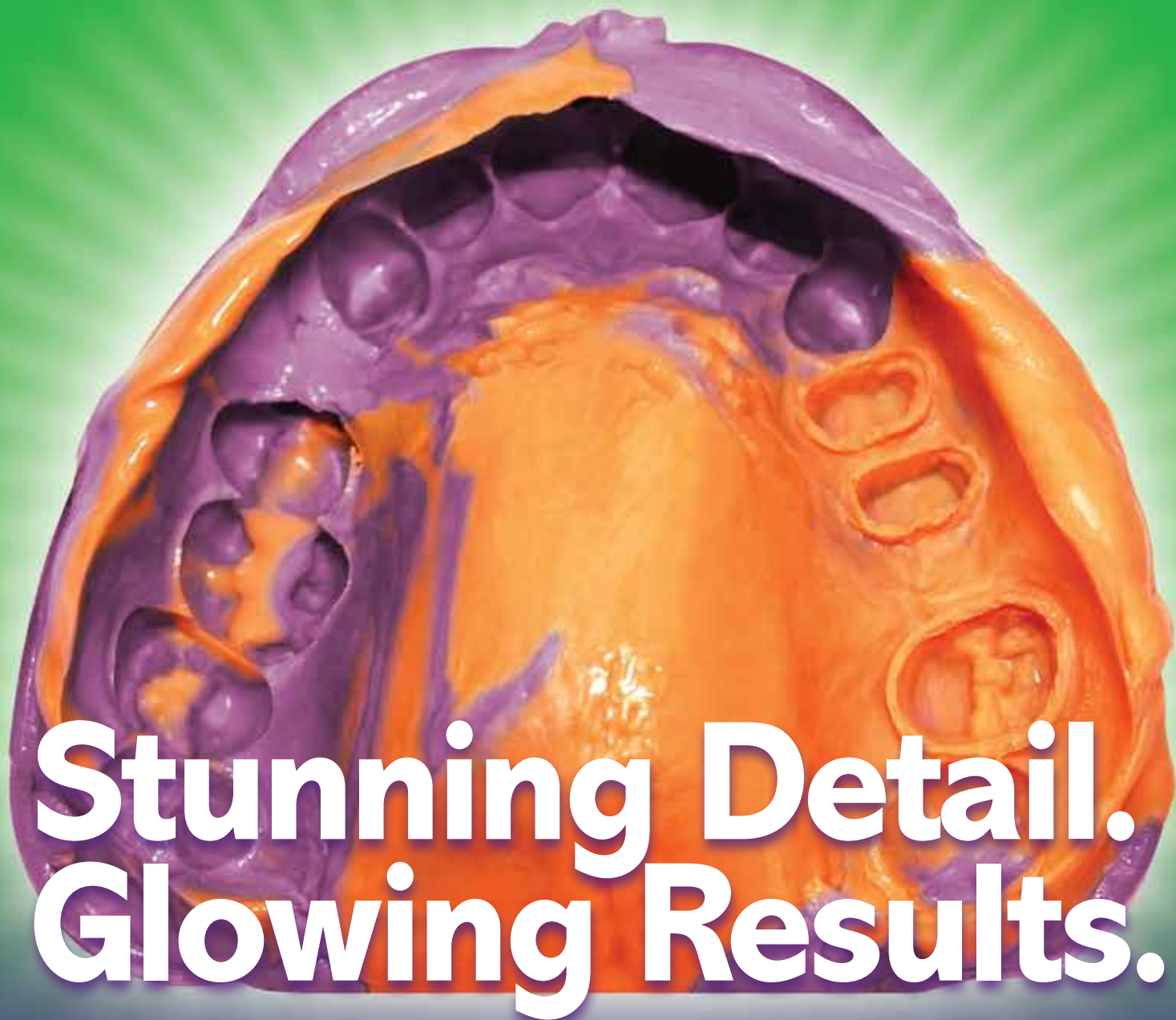
a mutual respect amongst all members of the team are imperative to keep things on track, on schedule and running smoothly.

Our goal with this and every edition of Efficiency in Group Practice is to provide you with expert advice and solid clinical and business resources to help you develop your ideal team and practice. In this edition, you'll find articles that will prompt discussion within your team about where you're going and how you're going to get there. Dr. Ben Burris has ten thriving practice locations and shares an interesting perspective on bargain hunting for supplies. Mike Uretz is back with a look at electronic health records vendors. Teresa Duncan of Odyssey Management offers sound advice for new managers and J. Haden Werhan shares wealth management strategies and principles.

Our sponsors have gone above and beyond to provide the best products and services to support your busy practices. We salute the teams at Garrison Dental Solutions, Hu-Friedy, Smile Reminder, DentalEZ, Ivoclar Vivadent, One Mind Health, Sultan Healthcare, Acteon North America, and Voco for helping today's group practices thrive. Each of them understands the value of being knowledgeable resources for you - their customers; not just "suppliers". Efficiency in Group Practice is intended as a guideline for the important discussions that should be taking place in any group practice. We hope you find the topics relevant and useful, and of course, we always look forward to your feedback. Let me know what you think by emailing me at BonnieH@HixsonBurrisMedia.com.

To your success,

Bonnie Hixson
Publisher



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Tips From The Trenches

Saving Money on Supplies



As dentists, this is one of our favorite topics. Perhaps only beaten out by discussing the interest rates we got from our banker. Obsession would be an understatement when talking about how we, as multi-practice, multi-provider practices view dental supply costs. We are taught from early on in school that cheaper is better and that we should always be shopping.

I like a deal as much as the next guy but in the last few years I've come to understand that there is a cost to:

- 1) constantly beating up suppliers for lower prices
- 2) constantly changing what we use because of cost

People, by and large, hate change. We hate to feel uncomfortable, we hate to try new things, we hate to be out of our element and we especially hate these things when in front of other people or when we are in a position of perceived authority (or having to perform). Every time we make a change to the supplies we use, we invite stress and loss of productivity so we must be vigilant about why and if we change anything even though, to us, it is not a huge deal.

A supplier, is a supplier, is a supplier... or at least I used to think so. In my eyes they all had the same products and it was simply a matter of getting them to war over who would give me the best price. They are, however, people as well. I am not saying I'll pay more than I have to, but these days I do actually try to be reasonable, create relationships and stay with one supplier long term as long as they

meet my needs. (The same can be said about bankers – I've recently learned how much latitude and credit I've gained by sticking with one bank for a long time.)

Other issues that large practices must deal with are:

- 1) How much must you buy to get the price you want?
- 2) What kind of financing will you get for what you buy?
- 3) Will your payments/financing exceed the useful life of the supplies you buy?
- 4) Shelf life?
- 5) Storage?
- 6) Security? (your stuff doesn't show up on ebay)
- 7) Is your purchasing person getting kick backs for buying from a given company?
- 8) Is your purchasing person looking out for your best interest?
- 9) Are you buying cheaper when there is a more expensive product that is faster or creates more capacity?
- 10) What percentage of your gross is in supply costs?

What we measure improves. This is an undeniable fact. You are all smart people with large practices. You know how to make things happen and don't need to be told how to do it. It is fun, however, sometimes to look at what your peers are thinking or looking at to give yourself a new view on yourself and your own practices. Just sayin'. Enjoy the ride and send in your commentary on this article to tell us what you do or what we missed. ■

3 Mistakes New Managers Make



By Teresa Duncan
MS, FADIA, FAADOM

Team leaders in dental offices are often created by accident or out of necessity. It's rare (but great) to find a manager whose position has been created and who has been recruited. It's usually an individual who has been promoted from an assistant or receptionist position and training is typically an afterthought.

Many new managers learn their skills on the job. When you place a person into a new position with which they're not familiar they tend to bring habits from their old position along with them. As a result new managers tend to make mistakes that could have been avoided through mentoring and guidance.

MISTAKE NUMBER



NOT REEVALUATING YOUR FRIENDSHIP WITH EXISTING TEAM MEMBERS

A new manager has often worked side-by-side with other team members for years sharing common experiences and common complaints. However, when you are leading a team you have to understand that those old allegiances need to be put aside. Newer managers tend to still prioritize their friendships with their coworkers because they have loyalty to them. But when you take a position of leadership your allegiance now belongs primarily to the office and then to the employees. This can be hard especially when you are used to commiserating with other employees about work situations. The new job will require oversight of friends and this can be uncomfortable for a new manager.

Once you become too close with employees it becomes almost impossible to manage them. Many times office workers will see patterns of favoritism because they are used to you and Joan being constant lunch buddies. Are you in the habit of going to happy hour and taking long lunches with your coworkers? I

hate to tell you this but generally this will not work in your new managerial position. This includes not giving in to office gossip – yes, even if you did this last week. New position, new expectations! Prepare your team by establishing new boundaries around your position. Let them know that you won't be able to take the lunches with them on a regular basis because you are learning new skills. Experienced managers will tell you that this is one of the hardest lessons to learn. It's in our nature to want to be liked but your priority is the success of the team and the practice.

MISTAKE NUMBER



CONTINUING TO PERFORM THE SAME JOB AND JUST ADDING MANAGERIAL TASKS INTO THE MIX

I'll bet that before the new tasks were assigned this was a full time position. Add in running reports and strategic planning and we now have an overworked, unprepared manager. Delegation does not come easily to your typical office leader. Our first inclination is to always do the job ourselves because 'it's just easier and faster that way.' Rather than retrain employees to perform routine jobs that we did without thinking, we continue to do the 'easy' tasks.

Managers are much more effective when they are performing high-level tasks such as report analysis, budget reviews and employee management. Entering insurance checks, scheduling appointments and answering the phone are easily delegable duties that will allow your new manager to focus on moving the practice forward. And what of the employees that are more than willing to take over tasks? If they're not utilized they will begin to wonder why. Employees are at their best when they are motivated by empowerment and the idea of learning new

Managers who have been with their employer for more than ten years will gladly tell you that they've been able to teach their dentists a few things about the business.

skills. It's human nature to want to expand our horizons. If you don't offer new opportunities or empowerment to your employees you risk demotivating them.

MISTAKE NUMBER



THE RELUCTANCE TO ASK FOR HELP

While I understand that no one wants to show that they are lacking in an area I believe that the most growth can occur at this time. A valuable manager will recognize when he or she needs more training. After all, we can see this in others so then why shouldn't we see it in ourselves? At the very least a manager needs to take introductory courses in human resources and small business financial reporting. Leadership and systems implementations are the next skills to learn. It's hard to master leadership – it is always a work in progress. Most great business leaders will emphasize that they learn from their employees every day.

Asking for help is a great way to forge a strong relationship with your owner/dentist. Chances are

that he or she did not take many business classes in dental school. Any classes or memberships can be shared between manager and dentist. Why not learn together? The doctor may also have no idea that you need training in areas such as insurance or accounts receivable management. Managers who have been with their employer for more than ten years will gladly tell you that they've been able to teach their dentists a few things about the business. What makes them valuable to the dentists is that the information was shared. The manager that doesn't share information does not help their office. Learn with your doctor and brainstorm together – this is what makes a strong management team.

Taking on more responsibility is a wonderful opportunity. You now have the chance to take your practice to the next level – you've been given the keys! Will you read the roadmap and ask for help or will you forge ahead blindly? I hope that you reach out for support and learning. We are never finished with our education and no doubt your new position will offer situations and conversations that will be unexpected. You're not alone – ask for help and manage your practice to future success. ■

Teresa Duncan is President of Odyssey Management, Inc. She is an international speaker that focuses on recapturing and maximizing revenue opportunities for dental offices. Insurance and accounts receivable systems are her specialty. She can be reached at Teresa@OdysseyMgmt.com.

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Level the Playing Field with Your Electronic Health Records Vendor



By Mike Uretz

Congratulations – As a group you’ve finally decided to pull the trigger on purchasing an electronic dental records system, increasingly being referred to in our industry as an electronic health records system (EHR). You’ve actually been thinking about this for quite a while with all the buzz surrounding clinical consistency and standardization, introduction of diagnostic coding sets, development of accountable care organizations, introduction of electronic referral technology, availability of federal subsidies for acquisition of EHR technology, growth of the oral systemic connection research, popularity of patient web portals, and looming changes in insurance reimbursements including focus on patient outcomes.

So, it appears that the writing is on the wall. For many reasons (many of which were pointed out in my previous article “Electronic Dental Records and the Efficient Group Practice”), it became apparent that this was one time you didn’t want to be left behind in a technological void. So, now you’re a willing participant in your own EHR adoption – but, what comes next?

As I consult with various dental professionals around the country regarding selection, purchase, and implementation of electronic dental records, I am fortunate to have met some great people along the way willing to share their concerns, worries, apprehensions and their personal stories. And the most critical piece of advice I share with them is “In order to level the playing field with vendors you must take charge and be in control of all the steps in this process”.

HOW DO I LEVEL THE PLAYING FIELD BY TAKING CHARGE OF MY PRODUCT SELECTION?

First of all, let’s get one thing clear. No matter what anybody says, you aren’t forced to purchase your present software vendor’s EHR offering if it doesn’t meet your needs from a technology, feature set, or ease-of-use perspective. We have been moving to a world where folks look at software as best-of-breed solutions and since your choice of EHR is essential to your future success is a group practice, it is important that you look at the selection in this way. Now, the caveat to that, of course, is that if your present software vendor does offer an EHR which fits your needs, then of course that is a good way to go. The point is don’t feel held hostage by your present software solution, as technology has changed dramatically over time and you need to implement the best solution for your needs.

So, how do you best come up with determining the right solution for your group? You could spend hours surfing the Web late at night, reading opinions, comments, and testimonials, hoping that one vendor will rise to the top. You could buy your colleagues expensive lunches in exchange for their thoughts and opinions. Or, you keep engaging in endless demos with pushy salespeople until you can’t do it anymore.

Or, you could do it “properly” and conduct an analytical process that puts you squarely in charge of determining the best product for your needs in a timely

fashion. And there are some tools that allow you to be proactive and get what you need from vendors rather than having the vendors control the process.

REQUEST FOR PROPOSALS

Why not let the vendors do a lot of the work for you with a nice little tool known as a Request for Proposal (or Request for Quote if you prefer). As a group practice you have many needs they can be detailed from various parts of your organization. Because of the work involved from the vendor side in answering an RFP, this can give you an idea of who is willing to work with you, develop a partnership, and address your needs. This document can consist of a number of areas, and at a minimum should have:

- 1) A Vendor business profile consisting of a laundry list of measures such as customer base, staff breakdown (R&D, support, etc.), profitability, product maturity, etc.
- 2) EHR feature requirements you are interested in broken into a matrix of “must have” and “desirable but not essential” features.
- 3) Implementation and training processes
- 4) Support processes
- 5) Technical considerations

REQUEST FOR PROPOSALS ARE IMPORTANT BECAUSE THEY CAN:

- 1) Communicate needs and expectations
- 2) Provide for a side by side feature comparison
- 3) Give you a sense of the vendor as a business
- 4) Document vendor commitments and promises
- 5) Be part of the overall contract

And, best of all, it doesn’t cost you anything at this point, except some “sweat equity”.

SCENARIO-BASED DEMONSTRATIONS

Be in control and get what YOU need from your EHR demonstrations. An old cliché that applies to most vendor run demonstrations... “Don’t let the inmates run the asylum”. The point here is that salespeople are well-trained to try to figure out how they should run a demonstration to make the sale but they don’t necessarily always take into account what you want to see what’s most important to you and tend to run things their way.

So the best strategy to counter this is to spend some time upfront before you enter into a demonstration by

developing various clinical scenarios that you would normally see in your daily life. Be in charge and have the vendor show you how their software would accommodate various situations that you are familiar with regarding your patients. It's a little bit of work for you to do this but by telling the vendor what you're interested in seeing drive puts you in more control.

Also, be wary of vendors who tend to have a one sided conversation, discussing solutions before they even understand your needs. You kind of feel that they are in sell mode all the time. Also, the liberal use of technical jargon to impress or confuse is a red flag. Finally, watch out for promises by vendors of great features to come, which might not materialize and are known in the industry as vaporware.

HOW DO I LEVEL THE PLAYING FIELD BY TAKING CHARGE OF VENDOR PRICE NEGOTIATIONS?

Last year I was a co-chairperson for a national advisory committee on EHR pricing and contracts best practices. As part of our work, in addition to developing recommendations for contracts, we addressed what items an EHR vendor should include in their pricing proposals and how these should be structured. And I can tell you that with the number of options included in a proposal there is ample opportunity for vendors to play smoke and mirrors with their proposal pricing.

Let's face it, nobody wants to feel that they paid full price while somebody else got a discount. However, caveat emptor, as this email from a concerned practice CFO warns. In fact, you might have run across the following unfortunate "used car scenario" yourself –

I was told that an almost 60% discount was only available through Friday (this was on a Thursday afternoon) since a training session was beginning on Friday. I won't be pressured into anything.

Obviously, situations like these should put up a red flag, whereas the following CFO's email addresses more of a win-win pricing negotiation.

"The bottom line is that everything is negotiable. I would agree with what has already been said. You have to find what your leverage is in negotiations. When I was involved negotiating with (VENDOR), they were very interested in breaking into the group practice

market in our geographical area and needed a solid reference account. I also had done my research and knew the market, so the vendor couldn't slip a higher than normal price by me.

Having personal experience as both a software purchaser and a vendor, I've been on both sides of this equation and I can tell you that the above email speaks to the win-win nature of successful price negotiations. You can try to bully the vendor into accepting your terms, but my experience has shown me that you can be much more successful with a partnership approach

If you try to understand your vendor's situation and needs, many times there will be reason for your vendor to give you good pricing. The case above points out that the vendor wanted to build up a stronger customer base. Also, the timing was right and the vendor wanted hit a certain sales quota. Maybe you're willing to act as a beta site for their product and give them feedback or you could be a great referral site for potential customers. Get to know your vendor and ask them how you could help their efforts. That type of relationship is worth something.

HOW DO I LEVEL THE PLAYING FIELD BY TAKING CHARGE OF MY CONTRACT?

From the consulting and speaking engagements I've had, I'm convinced that EHR contracts are an area of great concern and apprehension to group practices. The following email outlines this – "My question is whether anyone out there has suggestions on negotiating the fine points on a contract. Our biggest concern is that the contract only deals with our obligations...nothing about their guarantee about service and functionality.

After years of negotiating software contracts and support agreements myself, when I began looking at EHR contracts, I did notice that, on face value, they were fairly one sided. This makes sense though from the vendor's perspective. The vendor needs to look for maximum protection.

On the other hand, no matter what size group you are, you have as much right as the vendor to look out for your own interests. And this questioning of the contract doesn't happen enough...

A number of years ago I was involved with an EHR Summit and there were a number of vendors at the table. When discussing the topic of contracts, It was

interesting that one of the vendors pointed out that it was their experience that more often than not, practices just accept the contract they are given, sometimes with just minor modifications

And many times practices, even if practices opt to review the EHR contract, they don't necessarily don't necessarily use a specialized EHR or healthcare software expert for review and negotiation. They typically have their practice attorney review these documents and, although there are general legal sections in any contract, EHR and software contracts are specialized and have their own nuances and business issues

HOW DO I LEVEL THE PLAYING FIELD BY HOLDING MY VENDOR ACCOUNTABLE?

For some reason, Murphy's Law ("Anything that can go wrong, will go wrong"), seems to always kick in after the system is purchased, payment is tendered, and the practice is now dependent on the new technology. After all, you're paying a substantial percentage of your license fee every year for your support and maintenance "rights". But still, in most cases, the onus is on you to protect your own interests. I have infrequently run across a vendor that voluntarily offers to penalize themselves for poor support or that guarantees and commits to exactly how you will be taken care of. You need to become the "squeaky wheel" when you need support and a "squeaky wheel" gets better traction if you have contractual "teeth" backing you up. So, some things to take charge of...

PROBLEM ESCALATION

Whether it be your phone company or bank, have you ever gotten frustrated by the lack of knowledge or problem resolution by the immediate support person, and have asked to speak to the "manager". This is what I'm talking about. In the case of your EHR contract make sure escalation process is specified ahead of time. These are your rights. This can also include asking that the vendor's

support person come on site if the issue can't be resolved by the normal means in a reasonable timeframe.

RESPONSE AND RESOLUTION TIMES

How long does it take a vendor to respond to you when you have a problem? How long will it take to actually fix the problem? If your system is completely down or if this is an issue that affects patient care, will you be expected to wait 24 hours or will you get taken care of immediately. Be aware that different functions of the system might warrant different response times. For example, clinical documentation problems might need immediate attention, while a problem with a patient education module might not be as urgent. Get a commitment as to how long the vendor will guarantee a response to you. This includes associated financial penalties if they fail to meet their commitments. That's a powerful "squeaky wheel"!

By the way – These guarantees are becoming increasingly critical as we are moving toward cloud based systems.

SUPPORTING UPGRADES TO NEW VERSIONS

What about new releases of your software as time goes on? By paying your support and maintenance fee you certainly have the right to receive new releases free of charge (beware... sometimes a vendor will try to charge for this). But, I've seen contracts where a vendor has the right to expect you to upgrade in a short timeframe or support will be reduced or even dropped until you are compliant with the new system. From a vendor's perspective, this is great because they would only need to support the newest version. However, you might not want to install the newest version right away, as the time to test and install a new version is not trivial and can possibly impact your internal resources and the operation of your group. Also, many times, new releases can have some initial kinks. You should always expect that, at the very least, a vendor will support the previous version(s) for a reasonable amount of time. ■

Mike Uretz is a 30-year software veteran and nationally-recognized Healthcare software and Electronic Health Records (EHR) and expert. Mike has consulted with hundreds of practices and multi-clinic groups to help them properly evaluate and select their software solutions, structure and negotiate contracts, and provide management and oversight for their implementations. As co-chairman of the Best Practices advisory committee for EHR Contracts, Mike was instrumental in developing standards for structuring software contracts and pricing used nationwide. Mike is the founder and editorial director of www.DentalSoftwareAdvisor.com a trusted, and objective online resource on all matters related to dental software. Mike is also the Founder of the LinkedIn group Dental software, Electronic Dental records and Electronic Health Records. Mike can be contacted at MikeU@DentalSoftwareAdvisor.com

Embracing & Incorporating Care-Driven[®] Dentistry



By Rhonda Mullins

Disclaimer: Rhonda Mullins is the inventor/creator of Care-Driven[®] Dentistry, the C4 Yourself[®] Leadership and Management Principles, and the 4-C concept. This magazine and its entities hold no financial interest in the espoused rationales developed and utilized solely for her purpose as a dental consultant.



In recent years, research has indicated a link between oral health and overall health. Until this connection, oral health was considered independent of other health conditions, and dentistry focused mainly on oral maintenance and tooth repair.

Today, it has been accepted that comprehensive oral care is not only advantageous, but necessary in managing diabetes, coronary heart disease, and reducing premature mortality.¹ A thorough examination of the oral cavity, including a salivary analysis, and examination of craniofacial tissues can provide early indications for oral cancer, microbial infections, clues to the health of internal organs, immune disorders, gland function, systemic disorders, and overall general health.² In addition, the medical community is recognizing the importance of treating the physical, social, psychological, and emotional elements of a patient inclusively. As a result, dental practices are moving away from problem-solving, task-focused dentistry and toward a

pro-active, Care-Driven[®] approach.

DENTISTRY AND PSYCHOLOGY

According to studies, 70% of visits to primary care physicians are due to psychological factors such as generalized anxiety, depression, and stress.³ These issues can and do affect patients when confronted with oral health decisions. According to a study done by the Department of Sociology at McDaniel College, 50% of the study participants suffered from dental anxiety⁴ which can account for many missed or delayed treatments. Research indicates several elements associated with dental anxiety including the patient's general perception of dentists and of their

particular dentist,⁵ memories of previous painful or negative dental experiences,^{5,6} being treated in a detached and uncaring manner,^{5,7} lack of control over a possibly painful procedure,^{5,8} and fear of ridicule for appearing fearful or anxious.⁵

The interaction between clinical and psychosocial factors has gone largely unacknowledged in dental schools and the dental community. Research indicates the relationship between the patient and dentist rates most important for patient satisfaction and compliance.⁹ Interestingly enough, treatment acceptance and decision-making, are attained based upon non-clinical factors including the dentists personality, communication style, their compassion and ability to relate, their style of evaluation and diagnosis, all of which result in the development of trust or distrust. The patients that trust their dentists rely on their intuition, knowledge and judgment regarding treatment recommendations and outcomes.¹⁰

A research study performed by the Case School of Dental Medicine included 120 dental practices and recorded 3,803 patient/dentist/hygienist interactions and found that although dentists do utilize communication and comfort strategies, their inconsistency leads to missed opportunities.⁹ Because patients feel vulnerable while in a dentist's chair they appreciate all and any signs of compassion, even the slightest reassurance goes a long way toward comforting the patient and cultivating a trusting relationship. According to patient surveys, communication skills among dentists are considerably lacking and consistently rated as unsatisfactory.⁹ Patients desire open and honest communication from their practitioners specifically during the procedure but also regarding treatment, expectations, and outcome. With all the studies available regarding dental anxiety there are few demonstrating how to relieve it, how to make patients comfortable, and keep them coming back. Below are some strategies. Most cost nothing and are easy to incorporate into your practice to provide a caring and compassionate experience for each and every patient.

COMMUNICATION

Continue to communicate during the procedure by simply asking how the patient is doing every so often.⁹ Be intuitive and aware of the patient's body language in case they are embarrassed to signal that something is wrong. Communicate with a touch, a pat of the hand, or by gently rubbing their arm.⁹ Even subtle physical contact can relieve stress and anxiety and is symbolically sharing their pain.¹¹

Explain the steps you are taking, why, and what the patient should expect. For instance, tell them what instrument you are using, what it is for, and whether they should expect to feel pressure, a vibration, or pain.⁹ For those patients suffering from dental phobia's you might allow them to come in prior to, or earlier on the day of the appointment to meet the team, view the equipment, and become familiar with your practice.⁹

PHARMACOLOGY

Use a topical gel before administering anesthesia. Be sure to wait for anesthesia to take effect before beginning treatment. Create a signal the patient can use to get your attention if they are having a problem.⁹

ENVIRONMENTAL DISTRACTIONS

Although the suggestions here can range anywhere from free to costly based upon choice, they are all viable options. For instance, scenic murals give the patient something to focus on other than the treatment. Dimming the lights and playing a relaxation CD provides distraction and alleviates stress, massage chairs provide comfort, TV's provide pleasure and distraction, and headphones for CD's or TV tune out the sound of the drill.⁹

Patients want to trust their practitioner, be treated warmly, know they are cared for, and that their concerns are being addressed.¹² Care-Driven[®] dentistry acknowledges the psychosocial elements of the patient/dentist relationship and takes patient comfort and concerns into consideration.

CARE-DRIVEN® DENTISTRY

Most dental practices commonly rely on a transaction method of service. Care-Driven® dentistry is transformational. Rather than being a number or a “transaction” the dentist, team members, and staff tend to treat patients on a physical and emotional basis by being attentive to their needs and desires, and addressing their concerns. Patient questions are answered thoroughly and respectfully. Their personality, feelings, fears, and applicable life circumstances are taken into consideration when treatment decisions are made. They are not rushed in and out, or treated like a timed transaction. That’s because the dental staff takes a genuine interest in their well-being.

The distinguishing difference between transactional and transformational – dentistry performed in a Care-Driven® manner – is the propensity of the latter toward empathy and emotion rather than logic and practicality. While dentistry is a business, it is also a helping profession, and studies rate empathy as the highest priority among dental patients.¹³ Empathy encompasses communication, sincerity of interest, and understanding patient needs,¹³ and is a crucial element in a Care-Driven® dental practice. It contributes to feelings of comfort, helps decrease the prevalence of fear and anxiety associated with dental treatments, and encourages trust, promoting the doctor-patient relationship.

BENEFITS TO PATIENTS

In a Care-Driven® practice, the patient is treated as more than a number. They are a person with needs and desires, and a valued asset to the dental practice. The dental team cultivates long-term professional relationships with their patients, building trust, resulting in higher levels of patient satisfaction. Research utilizing the Importance-Performance Analysis (IPA), which evaluates patient and customer satisfaction with services, indicates that patients report higher rates of satisfaction having experienced dentistry with a Care-Driven® approach.¹⁴ Although patients want top-notch care, a driving factor in choice of a clinician is the

overall experience – how the patient is treated and how they feel during the visit. A large part of our decision making process is based on how we feel in any given situation. If the patient feels they are not the priority or that they have not been heard because they are rushed and uncomfortable, they will not gain trust in the dentist and team, when diagnoses, recommendations, and conversations take place. Thus, they’re positioned to make the decision not to execute care or return as a patient of record. However, if they feel you are present with them emotionally, focused on their desired outcome by demonstrating a welcoming attitude, valued like a familiar friend, they will feel relaxed and valued.

A transformational experience provides numerous benefits to patients, including comfort, increased responsiveness from the dentist and dental team and staff, decreased pain, confidence in care, and improved communication that results in increased clarity as to what to expect and other important details of treatment. Not only do these elements decrease dental anxiety, they encourage trust and foster a long-term relationship.

BENEFITS TO THE DENTAL TEAM

Research indicates that happy employees feel their jobs are meaningful and provide a sense of mastery, purpose and personal identity which, in turn, produces fulfillment – the key to job satisfaction.^{15,16} Albeit dentistry has always had purpose, to help maintain healthy and esthetically pleasing teeth, working in a practice that recognizes the importance of treating patients comprehensively gives those in the profession the chance to connect on a more personal level with their patients and help them fulfill their desires and calm their fears. This contributes to job satisfaction and a renewed passion for their work. For professionals in a helping profession, they find this new way of caring for patients invigorating and worthwhile. Delivering treatments beyond patient expectations instills a sense of pride, and not only do the patients feel valued but so do the employees. Appreciation also ranks high in job satisfaction.¹⁵ When

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employees feel valued and appreciated by thankful patients and by the dentist for providing patients with optimal care, and when they find their work meaningful and fulfilling, they become invested in what they do and do it well, benefitting everyone involved.

HOW TO DEVELOP A CARE-DRIVEN® PRACTICE

It doesn't take much to transform transactional into transformational dentistry, merely a change in philosophy and dedication and commitment to the key fundamentals in business significance:

- 1. Clear Vision**
- 2. Practice Systems**
- 3. Solution Strategies**
- 4. Consistent Execution**

A Care-Driven® philosophy begins with a daily “others” attitude which can be incorporated by simply anticipating your team’s needs and your patient’s needs on a more conscious level. Consider questions such as “Why are we here?” “Why has this patient chosen us to care for them?” “How can we serve this patient in a greater capacity?” “What can we do to be our best for them?” “What can we do to show we care?” “What can we do to make this experience significant for them in the short term and long term?” “How can we over anticipate their needs and exceed their expectations?”

Be ready to take action to address their specific concerns. One way is to practice “reflective listening” which is not just listening but “hearing” what your patients say and understanding their feelings, concerns and fears. Once you’ve heard what your patients have said, paraphrase their sentiments so they are certain you heard and understood.¹² If the patient is worried about pain and discomfort, discuss ways to address it and reassure them that you will take every precaution against it.⁴ If the patient fears gagging or choking, offer a solution to eliminate their fear, i.e., table salt on the tongue.⁴

Dr. McDougall, licensed in both dentistry and psychology, finds it very helpful to ask his patients about prior bad experiences and to address their concerns at length.

He and his team maintain communication throughout the procedure by explaining their actions, warning them if there will be pain or discomfort, and allowing them to stop the procedure if they have questions, concerns, or pain. This is helpful for patients who fear lack of control over the procedure.¹² It is important that all members of the dental staff and team consistently adopt the communication style and style of interaction that will make your patients most comfortable.

The results of the McDaniel College Research indicate that 93% of respondents preferred a friendly dentist, and 82% prefer they be talkative, which indicates openness and amicability.⁴ They also prefer they wear formal white lab coats rather than scrubs.⁴ The research uncovered clear patient preferences regarding the physical environment as well. Patients promote decorating walls with pictures, posters, and other odds and ends; recommend the waiting area be supplied with a variety of books and magazines; suggest relaxing background music; indicate that cooler temperatures are more comfortable; and suggest doors between the treatment rooms and waiting room be closed to eliminate irritation and anxiety occasioned by the sound of the drill.⁴

Care-Driven® dentistry goes above and beyond patient expectations. This is accomplished by realistic expectations, under promising and over delivering. Provide extraordinary performance in key areas such as customer care, communication, commitment, and professional and consistent execution.

Regarding communication, hone your skills to include understanding, cooperation, warmth, approachability, and friendliness. These traits are powerful when a patient is fearful or anxious regarding a dental procedure. Finally, provide comprehensive care utilizing a quality multi-disciplinary team committed to serving patients with the highest degree of kindness and respect, while providing them with optimum results.

TRANSACTIONAL MOMENTS VS. TRANSFORMATIONAL MOMENTS

Care-Driven® dentistry provides transformational moments as opposed to transactional moments. Transactional moments are task focused. For instance, the receptionist checks the patient in, the dental assistant calls the patient when it's their turn, the dentist fills the cavity then sends the patient to pay. Little conversation takes place besides "hello," the patient's name being called, the dentist greeting and seating them, culminating with the receptionist telling them how much they owe. A cleaning would play out in a similar manner. The hygienist would greet and seat, ask a few routine questions, perform the cleaning, send the patient to pay, etc. It is a task-focused transaction that includes checklists, routine questions, mechanical responses, and a lot of telling (without listening first).

Transformational moments elicit positive emotions, i.e. happiness, appreciation, trust. We have all been at an appointment, dental or otherwise, when a friend of the dentist, hygienist, or other team or staff member was scheduled for an appointment. There were smiles, laughing and joking, meaningful conversation, and sincere concern. You might have heard them asked, "How did that filling turn out for you?" or "Are you loving your veneers? They look great!" They were treated like a celebrity. You may have wondered why you're not treated that way. That is the difference between transformational and transactional dentistry. Their interaction with you was transactional, but the interaction with their friend was transformational or Care-Driven®.

It's not hard to turn transactional moments into transformational moments.

Consider the following suggestions:

TRANSACTIONAL: Focus on changing the patient's habits by telling.

TRANSFORMATIONAL: Focus on changing how the patient thinks through discussion.

TRANSACTIONAL: Focus on time management.

TRANSFORMATIONAL: Focus on the patient.

TRANSACTIONAL: Tell patients what they need to hear.

TRANSFORMATIONAL: Ask patients how they feel and influence them to action.

TRANSACTIONAL: Think logically.

TRANSFORMATIONAL: Think emotionally.

TRANSACTIONAL: Be a problem solver.

TRANSFORMATIONAL: Be a solution finder.

BENEFITS TO DENTIST AND DENTAL PRACTICE

Because effective communication increases the quality of the multi-disciplinary team and dentists/patient relationship which, in turn, increases patient satisfaction, retention, and referral, and because research indicates unsatisfactory relationships between dentist and patient as the major reason patients seek different oral care providers,¹⁷ practicing Care-Driven® dentistry and establishing strong and valued dentist/patient relationship is advantageous to the dentist and the success of their practice. Cultivating a trusting relationship with patients encourages patient retention and case acceptance, resulting in productivity and profitability.

CONCLUSION

According to the Managed Care Task Force of the American Dental Trade Association, at the beginning of the decade, U.S. patients were dissatisfied with the lack of communication and patient awareness exhibited by dentists.¹⁸ No longer interested in being simply a time slot, patients expect comprehensive treatment from practitioners invested in the outcome of their care. Historically, dentists defined their role as clinicians of oral health care and maintenance, yet, as other medical professionals, their

business is to serve people. Utilizing their professional medium, dentists help people by transforming lives via education, hopefulness, self-esteem, improved oral health, and subsequently, better overall health. Collaborative communication between the dentist and patient is a priority. It is the most effective way to improve the quality of their relationship and increase patient satisfaction.¹⁹ The dentist's behavior and interpersonal skills, the time and attention they devote to the patient, followed by the comfort level and relationship between the patient and dental teams, and knowledge of the patient's treatment needs all rate highly as factors influencing patient loyalty.²⁰ For Care-Driven® dentistry, standards are imperatively raised. Therefore, the patient is under promised yet receives optimum outcomes beyond their expectations. ■

Self-Evaluation Quiz:

1. **Examination of the oral cavity can provide information regarding**
 - A. Microbial infections
 - B. Anxiety and depression
 - C. Systemic disorders
 - D. Both A and C
2. **Care-Driven® dentistry is:**
 - A. Transformational
 - B. Transactional
 - C. Transformational and transactional
 - D. Neither transformational nor transactional
3. **Transactional dentistry:**
 - A. Tends to the patient's physical and emotional well-being
 - B. Is problem oriented
 - C. Both A and B
 - D. None of the above
4. **Transformational dentistry:**
 - A. Tends to the patient's physical and emotional well-being
 - B. Is problem oriented
 - C. Both A and B
 - D. None of the above
5. **Care-Driven® dentistry provides:**
 - A. Comfort
 - B. Increased responsiveness
 - C. Improved communication
 - D. All of the above
6. **Job satisfaction is highly determined by:**
 - A. The size of the practice
 - B. A sense of purpose
 - C. Appreciation
 - D. Both B and C
7. **To change a transactional moment into a transformational moment:**
 - A. Make the appointment short and sweet
 - B. Charge more money
 - C. Focus on the patient not on the time
 - D. Call the patient by their first name
8. **Feelings of happiness, appreciation, and trust are elicited by:**
 - A. Transactional moments
 - B. Transformational moments
 - C. A canceled appointment
 - D. Anesthesia
9. **Unsatisfactory relationships between dentists and patients cause:**
 - A. Ulcers
 - B. Tooth aches
 - C. Patients to seek different oral care providers
 - D. Migraines
10. **Care-Driven® dentistry:**
 - A. Is less expensive
 - B. Is more expensive
 - C. Over promises and under delivers
 - D. Under promises and over delivers

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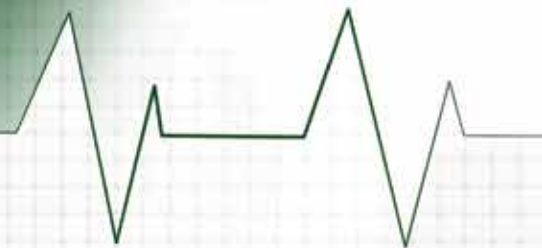
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Cultural Function and Strategic Advantage



By Robert Spiel, MBA & Art McCracken

Finger Pointing or Accountability

Entitlement or Empowerment

Function or Dysfunction

Mediocre Success or Unlimited Success

These outcomes do not occur by chance – they are the result of choice. Each day as the owner of or executive in a group practice, you choose between one and the other. Each day you set the stage for either function or dysfunction. Ultimately, the culture of your organization can and will define which of these outcomes you achieve. It's that simple – and yet that complex. Your culture can literally be your *“Secret Sauce.”*

Culture is on constant display in your organization and is experienced by every patient, referring provider, employee, and owner. You can't run from it. You can't hide from it. And while it is not seen with the naked eye, it is tangible.

Why pay attention to this? In part, because creating a truly effective culture pays enormous dividends. In their book *Corporate Culture and Performance*, Harvard researchers James Haskett and John Kotter share many compelling statistics to demonstrate the game-changing value in purposefully designing a business's culture. In their 11-year study, Haskett and Kotter found businesses that focused on building an effective culture grew 500% more than similar competing businesses that simply let culture happen.

There are also other, more immediate reasons to focus on your organization's culture: to increase employee involvement, improve efficiency, and to create exceptional patient experiences. Shawn Parr of Bulldog Drummond described culture as a "balanced blend of human psychology, attitudes, actions and beliefs that combined create either pleasure or pain, serious momentum or miserable stagnation." Shawn also goes on to boldly say that "Culture Eats Strategy for Lunch!" Quite simply, culture is the "way we do things around here," and it can include how:

- decision making happens
- communication occurs
- stress is handled
- problems are solved
- change is dealt with
- goals are set
- hiring occurs
- motivation is instilled

- appreciation is shown
- rewards are given
- training occurs
- feedback is provided
- systems are developed
- vision is created

Culture, however, just doesn't have "to happen." As shown by Haskett and Kotter – and backed up by over 50 years of combined experience -- the businesses with superior results make conscious, consistent decisions to create and perpetuate high performance organizational cultures that are resilient, proactive, efficient and able to stand the test of time. As corporate culture expert Travis Anderson of Strategic Leadership Consulting said in a recent interview,

**"You can either
have culture
by default,
or culture
by design.
It's your choice."**

Disney, Patagonia, Zappos.com, Google, Ritz Carlton, Toyota, Nordstrom, Whole Foods, In-N-Out Burger and Starbucks. Each one of these company names creates a mental experience associated with their brand. What they all have in common is a relentless pursuit of cultural clarity and design. As an example, Zappos.com will actually pay their employees to leave if they are not a cultural fit in an effort to protect what they would consider to be their 'secret sauce.' Each of these companies carries significant value

in the market place with sustained results year after year. Their growth is fascinating, and if you asked them, they would tell you it is in direct correlation to the culture they fight to protect.

Cultural transformation begins at the top. As a leader in your organization you must begin with an honest assessment of where your group is at and what role you can play in designing a winning culture. As hard as any group tries, it is impossible for a group to run faster than its leaders. The energy, passion, resilience and professionalism exuded by your organization are a direct reflection of you and your efforts.

Given the game-changing nature of culture, as a self-assessment of your own organization's culture, please check the box next to each question below IF the answer is yes:

- ☐ Is there limited accountability among team members and/or owners?
- ☐ Is there blaming and complaining going on regarding the economy, patients, doctors or staff?
- ☐ Are team members or owners resistant to change?
- ☐ Does the practice experience heavy turn over in personnel?
- ☐ Are team members viewed by the owners/management as replaceable?
- ☐ Is information withheld to maintain "control"?
- ☐ Is the leadership style passive or conflicting -- leading to a lack of vision, inconsistency in results and ineffective communication?

- ❑ Is showing appreciation rare?
- ❑ Is there a low level of no level of team work taking place?
- ❑ Are purse strings ultra tight with no investment in people?

Answers of “yes” to five or more of the above questions are an indication that the culture in your organization is critically ineffective. An answer of “yes” to seven or more puts your company at a code-blue stage. If nine or more were “yeses”, congratulations on still being in business. You won’t be for long.

Specific to the Group Practice Industry is how to effectively maintain a strong culture during heavy growth spurts or during acquisitions. Anytime new team members are added to the mix, you run the risk of cultural alteration and confusion. This phenomenon can be likened to adding yeast to dough. Handled badly, your bread can be ruined, handled well, the added team members can help the entire organization rise and create an even better outcome.

Turning a culture around is doable, and the steps to rebuild are the same steps as building it from the ground up. These essential steps to designing a functional, high performing culture include:

OWN IT:

Own your culture and your destiny. All progress begins first with owning the process and the results. The mindset of blaming and complaining is a trap that leads to dead ends and broken dreams. Take an honest appraisal of where your organization is from the quiz above, and honestly ask yourself the question, “What would it take to eliminate these dysfunctions from our business model, and what is my role in that?”

FOCUS & PASSION:

Sharpen your focus and passion. High performance cultures cannot be built on a foundation of money only. There must be a genuine drive for excellence in patient care and employee growth internalized by all members of the organization that starts with the owners and executive team. Don’t just own a business. Create and have a clearly defined, core-based vision statement that will act as a template for the future – and put that vision in writing. Share it with your team and solicit their commitment to that vision. Once you have a core set of believers, turn that vision into an internal force for each member of the team, and only hire employees who fit with your vision and clearly defined culture.

TRUST:

Establish transparency, integrity and authenticity. Trust is the foundation of all human relationships, but when leaders are inconsistent, don’t keep promises, speak negatively about others and hide relevant information, trust is severely eroded. Additionally, patients will only buy from those they like and trust. Be authentic in your dealings with team members and patients. Let them experience your genuine care. Engage the help of your team and partners. Don’t be afraid of being vulnerable and share the stress as well as the success.

WALK THE TALK:

Walk the talk so that values practiced = values espoused. Culture, as we have said, ultimately becomes a reflection of the values, character and focus of the owners and executive team. You cannot preach one thing, practice another, and expect to build a performance based, effective culture.

INVEST IN YOUR HUMAN CAPITAL:

People are your greatest asset; invest in them and invest in the development of your culture. Celebrate their wins and be committed to mentoring your team to greatness. When a leader realizes that his/her commitment to the success of each team member reflects back ten times in the success of the organization, great things happen.

COLLABORATE:

Create an environment of collaboration and shared ownership. The greatest words heard by a team member, as Linda Miles has said, are “I need your help.” Be willing to push decision making to the lowest level with clear budgets and boundaries. Make autonomy and teamwork hallmarks of the business. Delegate appropriately and train your team to be problem solvers – and then circle back with the owner.

ACCOUNTABILITY:

Develop a results- oriented business model with a high level of accountability. Focus your entire team on key metrics with achievable, clear measurements and clear rewards for accomplishing pre-set goals. Help your team think like owners and set their own professional goals as well. Hold yourself accountable for your goals, and help your team by creating points of accountability for their goals as well. Let your team also know the consequences for non-performance, as needed, and remember the age-old rule: praise in public and reprimand in private.

PATIENCE:

Realize that rebuilding a culture takes time, commitment and vision.

Where should a group practice owner start today if they see their culture isn't where it needs to be? What are the immediate steps to be taken today by progressive practice owners to capture the prize of a high performance culture?

- Stop blaming and complaining. No progress in life or business starts until this reflex is overcome. Own the problem and the solution. Remember a victim mindset gets a person nowhere – even when there are significant challenges for an organization. Continually ask the question: “What can “I” do to _____?” and then act on it.

- Start now to by asking the question: “Knowing what I know now...what would I do differently and who would I bring with me on that new venture?” By pushing the mental and emotional “reset” button you can see more clearly the missteps made and the pathway to greater success and happiness. Then get your plan into writing. If a business coach would help with the development and execution of a plan, get one. The right consultant(s) can be an excellent investment.

- Embrace your role as a leader. Understand first and foremost that culture by design comes from leadership by intent. If leadership seems intimidating, remember the first mistake you made in business. Leadership is a skill that can be developed just like any other skill – and the impact of developing it affects much more than just your organization.

- Invest time and money into

cultural development. It doesn't happen on its own. Customized training that breaks through personal barriers is critical to jumpstart the process. Invest in your team. Invest in yourself.

- Reset your and your team's expectations. Let them know you need their help and bring with you those who fit with the new culture while helping the others find a new place to land. Make commitments to your team and allow them to hold you accountable for them – and facilitate goal setting for your team members and follow up on their goals regularly.
- Realize cultural transformation begins with personal transformation. High performance cultures are a reflection of high performance leaders and team builders. The single greatest common differentiator between functional (by design) cultures and dysfunctional (by default) cultures is leadership! The essentials listed earlier are all by-products of strong and functional leadership.

Culture “by design” is an essential part of changing the path your business may be on currently. It specifically addresses the health, and profitability of an organization through team engagement, collaboration, empowerment and gratitude. Active, values-based leadership is the catalyst required to create such a functional culture. And, as examples all around us show, a

truly functional culture designed with specific intent has a binding effect on team members, mid level managers, executive level owners, and patients -- and it is “the secret sauce” to long-term business stability, adaptability and future growth.

It is not enough to stand idly by and hope for things to get better. External changes are inevitable. Internal change is something you as a leader in your business have direct influence over. Have you identified YOUR role and responsibility in the change that needs to take place? It's time to implement the necessary ingredients as you begin creating...

YOUR SECRET SAUCE! ■



Arthur McCracken, CEO and Founder of Synapse Point Consulting and Robert Spiel, MBA, CEO and Founder of Spiel & Associates Consulting collaborate in providing personal leadership, team building and coaching for practice owners nationwide. They specialize in assisting owners in creating high performance work teams that consistently produce outstanding results for the owner, team members and patients. They also provide services in associate/owner transitions, partnership dynamics and post-fraud remediation. Members of the Speaking Consulting Network, they are available to speak nationwide. They can be contacted at art@synapsepointconsulting.com and bob@spielconsulting.com.

Wealth Management For Dentists



By J. Haden
Werhan
CPA, PFS

Wealth. Management. Take each word by itself, and each is simple enough. But what deeper meaning can we achieve in combining them? While the catch phrase “wealth management” is used to mean any number of things within the wider financial industry, I offer a working definition to help you consider what it can mean to you — as a dentist, a family and community member, and an individual.

WHY WEALTH MANAGEMENT?

Let's first set the stage by discussing why you may need wealth management to begin with. Whether you're at start-up, mid-career, or nearing or into retirement, as a dentist, you probably have a whole lot going on within your financial concerns, to say the least.

You must:

- Manage your practice and its intricate patient care, business, human resource, financial/accounting and tax considerations

- Determine how to extract appropriate levels of earnings for personal debt pay-off, spending, saving and investing goals
- Plan for and enjoy a retirement on your own terms
- Protect personal and professional assets against unforeseen threats
- Steward family wealth for desired legacy and charitable pursuits

With so much to consider within the scope of your wealth-related interests, it's not surprising that uncomfortable gaps emerge. To name a few, young dentists

face conflicts between paying off college debt while starting their practice and saving for the future. Pass that hurdle, and you face tough choices between growing your practice while enjoying the improved lifestyle you've earned, and building your personal portfolio toward retirement or other long-term goals. Throughout, you must manage the risks that you can — in your professional, personal and financial affairs — while minimizing the costs and uncertainties involved.

Thus, even as your wealth accumulates, those gaps leave you worried; wondering whether you're overlooking some important detail that's going to sooner or later cause you grief.

Without wealth management, financial goals tend to distract rather than contribute to the quality of your life.

WEALTH MANAGEMENT DEFINED

Wealth management is a life-long process that is far more than the sum of its parts. It's a "way of life" model for confidently bridging those distracting gaps among your competing financial goals. The result is that you are freed to devote your energy to getting the most out of your practice, your personal life and your wealth. (However you personally define "the most.")

TO DRILL DOWN A LITTLE FURTHER, WEALTH MANAGEMENT IS ADVANCED PLANNING WHICH INCLUDES:

- **WEALTH ENHANCEMENT** — Using appropriate, low-cost investment vehicles tailored to match your unique willingness, ability and need to tolerate market risk, in pursuit of expected, long-term market returns. Included in our definition of "low-cost," are efforts to maximize tax efficiency, as among the most significant, and often-overlooked drags on end returns. A wealth manager is expected to be well versed in applying these and related tenets of sound investing.
- **WEALTH TRANSFER** — Finding and facilitating the most tax-efficient way to pass assets to succeeding generations in a way that meets your wishes.

- **WEALTH PROTECTION** — Protecting your wealth against potential creditors, litigants, children's spouses and potential ex-spouses, as well as protecting yourself against catastrophic loss.
- **CHARITABLE GIFTING** — Helping you plan for and fulfill your charitable goals in concert with the preceding three interests.

Wealth management also includes relationship management, which is really the heart of where that "gap-bridging" occurs.

- **DISCOVERY AND GOALS SETTING** — With regular and frequent meetings, your wealth manager should discover and maintain an intimate knowledge of your greatest financial challenges and dreams, as they are today and as they may evolve over time.
- **A WRITTEN PLAN** — By forming a written plan that you regularly revisit, a wealth manager should keep you focused on your stated goals, help you revise them when appropriate, and help you avoid the many temptations and traps that might otherwise knock you off-course.
- **WELL-COORDINATED ACTIVITIES** — Relationship management also includes managing your range of professional advisor relationships. By acting as your personal Chief Financial Officer, a wealth manager should ensure that your lawyers, insurance experts, bankers, consultants, practice managers and others are moving as a team, each in his or her specialty, toward your common highest interests.

THE DENTIST-SPECIFIC, WEALTH MANAGER EDGE

Lastly, this may be a bold statement, but we believe that wealth management for dentists demands industry-specific expertise for maximum ability to address the many challenges that are distinct to your profession. Ultimately, how can you, a dentist, most successfully "create" monies needed to close those uncomfortable gaps in your professional and personal pursuits? By working with a wealth manager who deeply understands the intricacies of

your dental practice – including your chosen specialty – you can be best-positioned to add that extraordinary levels of efficiency that is likely to be missing from a generalist relationship.

For example, most general CPAs or financial planners might review your tax returns and profit & loss statements as their basis for calculating earnings and forming a plan. A wealth manager and CPA who specializes in dental clients can be expected to extract considerably more information from your personal and professional circumstances, for crafting a more tightly tailored plan. He or she may draw on detailed management financial statements, practice reports showing production (by provider), collections, adjustments (by category), accounts receivable aging, procedure code analysis reports, new patient reports ... you get the idea.

In addition, having the ability to benchmark your practice against appropriate industry standard data is an invaluable tool. It offers you the vital context needed to assess not only how you're doing, but also how you're doing in comparison.

Think of it this way: Most generalist CPAs and financial planners look at the equivalent of a set of bite-wing radiographs; dental specific CPAs and wealth managers analyze a Cone Beam CT Scan to diagnose problem areas in a practice and make recommendations that are deeper

and farther reaching than any simple view could afford.

The details exposed by the thorough analysis might be resolved by basics, such as focusing on overhead, establishing production goals, and more efficiently managing the calendar (days worked). It also could mean referring your practice to a specialist for particular concerns — a consultant skilled in areas such as personnel matters, employee morale, basic business systems, effective communications, treatment planning, fee schedule assessment or department-specific profit management. Each of these highly specialized experts do exist. And each can represent critical, gap-filling relationships if properly integrated within your overall wealth management needs.

Are you beginning to see wealth management as we define it? Combine the broad solutions of personal wealth management (wealth enhancement, wealth transfer, wealth protection and charitable planning) with dental-specific practice- and tax-management expertise. Form a close, collaborative relationship among you, your wealth manager and your collective team of specialists. Continue expanding on the process and the relationship throughout your evolving career. That is my prescription for helping you reach your own life's goals while delivering the highest quality oral health care that your family of patients expect and deserve. ■

J. Haden Werhan, CPA/PFS is a partner at Thomas Wirig Doll in Walnut Creek, CA. He and his firm focus on working only with doctors. They provide dentists with wealth management, tax planning, accounting, practice transition consulting and retirement planning. Haden has spent his entire thirty-year career working with dentists, so his deep industry knowledge makes him uniquely qualified to support his clients in these areas. The most rewarding part of Haden's job is when he knows he's made a difference a dentist's life. "It's about more than saving them a few bucks on their taxes. It's about helping them gain a clear picture of what it will take to get where they want to be in life. With good financial reporting and management tools, we help dentists reach a point where they go to work because they want to – not because they have to. This is very satisfying," says Werhan. Haden regularly lectures and provides seminars on tax and financial planning, practice management and practice transitions at the University of California, San Francisco, the University of the Pacific Arthur A. Dugoni School of Dentistry and various dental societies. When he isn't busy helping his dental clients with their wealth management needs, Haden can be found flying his plane, scuba diving or swimming. He welcomes your questions about all things related to the business of dentistry. Email him at haden@twdadvisors.com or give him a call at 877-939-2500.



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The Sweet Smell of Success

The Science of Scent

The science behind scent has become an enormously profitable business. Smell is powerful, primal, and unforgettable. Nothing can trigger memories faster than smell and taste.



By John Graham
DDS, MD

I've been on a quest over the past 4 years, a quest that has helped transform my office. The transformation has been about "feel", the feel of the experience. You see, like most of us, I strive for clinical excellence. I've surrounded myself with clinicians whom I deem to be some of the greatest in the world. I've tirelessly worked, like all of us, to be an excellent clinician in every sense of the word. My hope has always been that if I can provide wonderful clinical results, then patients will talk, doctors will notice, and my practice will grow.

While that may have happened to some extent, we all know that there are many patients who cannot discern between good orthodontics and outstanding orthodontics. So, my quest has been to augment the patient "experience" in my office. I've done this by layering many little things, one on top of the other, like a tapestry. Mind you, I don't have

a showy office; I don't have an over-the-top game room. What I do have, or at least what I strive for every day, is an environment that is different from most patients' daily experiences. I want patients to look forward to their visits; I want them to recognize the "branding" of my office and my treatment. I've done this by doing many different things, but one in particular has helped put the icing on the cake.

This story goes back several years when my wife and I were at a meeting at the Wynn Hotel in Las Vegas. As I was in the branding mood, I started noticing the subtleties that made me want to be there, that made me want to stay, all because of the total Wynn experience. The music was down tempo, hip and relaxing. I quickly found the artists that were a part of the hotel's ambient sound track, and incorporated them into my office atmosphere. Less noticeable but arguably more powerful were

the wispy fragrant wafts I would notice from time to time. The scents were amazing. They were energizing, exotic, sensual and clean. They really contributed to the entire experience in an unforgettable way. When I returned a year later for another meeting, instantly my nose recognized the smell of the hotel and my memories of my prior experience flooded back.

It turns out that the science behind scent has become an enormously profitable business. Smell is powerful, primal, and unforgettable. Nothing can trigger memories faster than smell and taste. In fact, many studies, like a report in the Journal of Marketing (Spangenberg, Crowley and Henderson, 1996) found that scents or aromas in the retail environment “improve a customer’s perception of the store, the environment and the products; and makes the customer want to revisit the store to buy something.” Casino’s know this, and they work hard at it.

The Mirage was the first casino in Las Vegas to install a hotel-wide aroma system by a company called AromaSys. Many hotels on the strip have now installed systems such as the Mirage’s, and many companies have brought competition to AromaSys.

Sensory branding has become an industry all to itself. Leading the charge is Martin Lindstrom who is the author of BRAND sense, a Fast Company Book of the Month, which explores what he calls 3D marketing. Lindstrom speaks about how the fresh smell of a new car, and the perfect sound of a closing car door, are all orchestrated by the manufacturers. That isn’t really new car you’re smelling, it’s a fabricated scent that imparts quality and freshness. It’s just like the smell that Singapore Airlines, or the Westin Hotels and Resorts have patented. In fact, you can buy the Westin smell for your home, but the Wynn’s scent? Forget it, it’s a secret.

I finally decided to pull the trigger on a scent system after having visited my brother’s incredible spa-like dental office in Salt Lake City, Utah. I had visited it on several occasions previously, but on one day in particular, the smell of his office as I opened the front door hit me. Not only because the smell was fabulous, it was also familiar. It was the smell of his office! He had done it, he had branded his office with

a smell! Like my brother, I decided to move forward with scenting my office. This goes far beyond spraying Febreze in the clinic. This is carefully crafting a scent that fits the personality of your office, and metering it such that it is not overpowering. It must be subtle, yet noticeable. I chose to go with the company that my brother has been using for several years, and that is also used by Bloomingdale’s, the Madalay Bay Resort & Casino, the Hard Rock Hotel and others. The company is called ScentAir, and they take their business seriously.

My “consultation” with a ScentAir rep took nearly 2 hours. He first observed the square footage and layout of my office, and determined the number of units that I would need. For my setup, only one was necessary. Then the laborious process of choosing a scent commenced. This may sound easy but mind you, I was trying to brand my office, much like my brother did. I wanted this scent to speak my practice name every time a patient walked in the door. ScentAir has over 1600 scent combinations to choose from, so do your homework.

I researched the scents of hotels, spas and the like. I scoured message boards of marketing directors that were discussing scent branding. I took notes and started to develop a list of scents that seemed to recur commonly. Armed with this list my staff and I narrowed the scents down to about four. Then we took the scented oil soaked strips to the patients. I spent an entire morning shoving strips under patient’s noses, young and old. I kept a tally of responses, noting the scents that patients asked to smell again. You only need to smell a scent once that you don’t like, but if you ask to smell it again, you’re on to something.

Within an hour of having our machine installed, we were getting compliments. Patients were asking what the smell was, and where we got it. To them it smells clean, fresh and energizing. We plan to change the scent only around the holidays, where we will incorporate the smell of pine to enhance our Christmas in the desert. What this experience has demonstrated to me is that scent really matters, but only if we as doctors pay attention to it. Patients will notice, I promise. As for the scent I chose? Forget it, it’s a secret. ■

Dr. John Graham received his Bachelor of Science degree from Brigham Young University. He received his dental degree from Baylor College of Dentistry in Dallas, TX, and then received his medical degree from the University of Texas Southwestern Medical School. After medical school, Dr. Graham completed an internship in general surgery at Parkland Memorial Hospital followed by training in oral and maxillofacial surgery. Following his surgical training, Dr. Graham received his certificate in orthodontics from the University of Rochester/Eastman Dental Center in Rochester, New York. Dr. Graham is one of only a handful of orthodontists in the United States who is also a physician. An innovator and educator, Dr. Graham lectures worldwide to both doctors and orthodontic staff on the most advanced orthodontic treatment philosophies available. Dr. Graham has several patents pending on orthodontic treatment devices, has co-authored several orthodontic textbook chapters, and has written many professional journal articles.

The Doctor's Role in Keeping Hygiene ON TIME



By Rachel Wall
BS

In a world of daily schedules and dozens of appointments, we live and die by the clock. Nothing is more frustrating for everyone on the team than chronically running behind and making patients wait. While you and your administrative team may feel that this is the hygiene team's problem, there are some specific things YOU can do to help keep them running on time. The truth is, your hygiene team is probably just as frustrated with this as you are. So why not get to the root of the problem once and for all?

Let's face it; we're not dealing with widgets that move along the production line without a fuss. We're dealing with actual human beings who can be unpredictable and whose needs can change with little notice.

THE #1 REASON WE RUN BEHIND

In all of my work with thousands of dental professionals through coaching and speaking, I am convinced that the number one reason for running behind is that your hygienists are stuck in the "Prophy Trap". There's much more going on in a successful hygiene program than just simple prophy appointments.

YOU KNOW YOU'RE IN THE PROPHY TRAP IF:

- Your hygienists habitually run behind
- Most hygiene appointments are scheduled as prophy appointments, and few scaling and root planning appointments are on the books.
- You often see there has been bleeding during the prophy. This is a clear indicator that the patient may be in need of more extensive perio therapy rather than a simply prophy or "maintenance" appointment.
- Your hygienist complains about pain or physical fatigue from scaling. Again, it may be time to speak with your hygiene team about a more comprehensive approach to your patients' oral health.
- Your hygiene department is not profitable. This may be an indicator that it's time to confirm that you're billing for the types of services that are actually being performed.



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- Many of your patients are on a 3-month prophylaxis recall

Dental teams often ask ‘what should take place during a hygiene visit?’ If you breakdown the 60 minute appointment into 20 minute increments, the time is used like this:

20 MINUTES --- Hygiene Exam and data collection (perio charting, oral cancer exam, x-rays, review of restorative needs, medical history review and patient concerns, photos)

20 MINUTES --- Scaling and Polishing

20 MINUTES --- Doc Exam and room turnover, schedule next appointment

If your hygienist spends much more than 20-25 minutes on scaling and polishing, it’s likely the patient needs something other than a prophylaxis.

If during a 60-minute prophylaxis appointment, 45 minutes are spent on scaling, your patient is clearly in need of more than a simple prophylaxis. In this situation, there’s also little time left for restorative and/or perio co-diagnosis, documentation, complete perio charting and other critical components of a complete hygiene evaluation. To give your patients the care they need, it’s important that they’re being scheduled for the appropriate treatment and with adequate time to get the job done!

ACTION STEPS

SO WHAT’S YOUR JOB AS THE DOCTOR, TO MAKE SURE YOUR HYGIENE TEAM RUNS ON TIME?

1 The first step is to determine whether you’re stuck in the Prophylaxis Trap. One way to do that is to determine your perio percentage. If it’s below 20%, chances are you and your team may be under diagnosing perio in new and existing patients. Pair that with lots of heavy scaling during prophylaxes or more than 20-25 minutes of scaling and you’re in a risky position where your hygienist may be doing SRP but calling it a prophylaxis. To determine your perio percentage, go to www.inspiredhygiene.com/periotool to

download an easy to use tool to determine your percentage in 5 minutes or less.

2 Next, give your hygiene team the tools they need to get out of the Prophylaxis Trap. Whether this is hiring a consultant or taking a continuing education course or virtual training, it’s critical to develop a clear, written plan for determining when patients are indeed healthy and when they need to move into some other type of treatment.

3 The third step is to give your hygienists enough time. If your hygiene appointments are 45 minutes rather than 60, your hygienist now has 25 minutes to do the complete hygiene exam and squeeze in the doctor exam. Inevitably, things get left out and the prophylaxis quickly becomes the primary objective for the visit. Not determining health or disease, not enrolling in restorative treatment, not utilizing adjunct services...just the prophylaxis. And you have to perform a lot of prophylaxes to be productive.

If your hygienist starts scaling 4-5min after seating the patient and/or dismisses the patient early, chances are there is no clear system for a complete hygiene exam and co-diagnosis. When hygienists have the luxury of a 60minute template, if they don’t use it, they may lose it.

Finally, give your hygienist permission to call for the doctor exam as soon as they finish their data collection. So as soon as they complete the hygiene exam and BEFORE they pick up a scaler, they should call and let you know they’re ready. This means you can do the exam at any time during the remainder of that appointment. No more waiting until the last minute, often resulting in a mad rush to get through the exam. And also give them permission to call you again if needed within 10-15 minutes of the end of the exam.

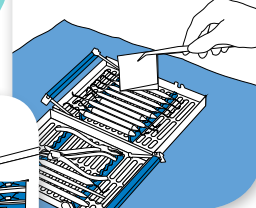
Your hygiene team is an extremely valuable part of the overall experience and connection your patients feel towards your practice. Give them the tools that result in a lifetime of health for your team, your patients and your practice. ■

As owner of Inspired Hygiene, Rachel helps dentists tap into hygiene’s profit potential. In addition to coaching, Rachel draws from her 20 years of experience as a hygienist and practice administrator to deliver to-the-point articles and speaking programs. She has spoken across the country including RDH Under One Roof, the AACD annual session and the popular The Profitable Dentist seminar in Destin, FL. Rachel has written for and been featured in numerous industry journals as well. Inspired Hygiene’s programs include in-office coaching, a free weekly e-zine, the Hygiene Profits Mastermind group and the new Profitable Perio Online Workshop. Inspired Hygiene is the preferred hygiene coaching group for the Productive Dentist Academy and a corporate partner with Philips Sonicare. To contact Rachel, email her at Rachel@InspiredHygiene.com or call her at 877-237-7230.

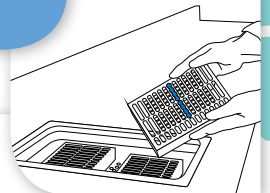


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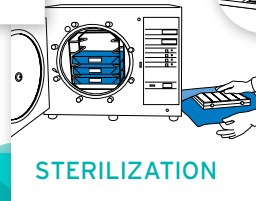
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How the best perform





Less Talk, *More Action*



By Ben Burris
DDS, MDS

These are interesting times. Recent discussions I've had with dentists and dental students have centered on the economy, the political climate, staffing issues, competition, taxes, lack of opportunity and transition planning. It seems we all have our own personal fears or worries that tend to consume our lives, but oftentimes all we do is talk about it (and talk is a kind word here). We, as dentists and as humans in general, tend to focus on the negative. We worry about the 3% of things that may go wrong instead of focusing on the 97% of the time things that go well. Will I be sued? Will I be disabled? Will patients show up? Will I go broke?

"Your thoughts create your words, your words create your actions and your actions create your reality."

Read that last statement again.
The most successful people - including dentists focus on their goals and deal with problems when and *IF* they occur."

These are common questions that haunt many dentists. I am not saying we should not be prepared for these possible contingencies; but, seriously, how many of you personally know a dentist who has been successfully sued? (For the few of you with your hands up, my guess is that more often than not the offense was so egregious or the issue ignored so long that a suit was merited!)

I am suggesting that we should concentrate on what we want as opposed to focusing on what we don't want. Your thoughts create your words, your words create your actions and your actions create your reality. Read that last statement again. The most successful people - including dentists focus on their goals and deal with problems when and IF they occur. They begin with the end in mind and methodically move towards the goal. Unfortunately most people and many dentists focus on the potential problems to the point that they give up on accomplishing the dream and write it off as "impossible" or "can't be done". From the moment they decide that this is the truth, they're right! Many are defeated before they even start! We hear, "Of course I complain, look at how terrible my life is." when the truth is that, "It is because I complain that my life is so terrible". We create our reality with our thoughts and words and our actions spring from them.

Now for the practical application...

A great exercise is to decide what you fear most (the thing that you think about just before you go to sleep, in the shower, alone in the car...) and then face it head on. Today! Our tendency is to shy away from things that are intimidating or scary. This is human nature, but it is only when we are able to conquer human weakness and turn squarely to face our fears that we almost always come to the realization that the issue in question is not nearly as daunting as we had imagined it would be. Even if we discover the issue to be a significant one, there is no advantage to avoiding the problem. In the long run, we must still deal with our fears and the sooner we realize that hiding from them or waiting only prolongs and protracts the anguish.

LET'S DISCUSS THE COMMON COMPLAINTS AND FEARS MENTIONED ABOVE AND HOW WE CAN TAKE ACTION TO IMPROVE OUR CIRCUMSTANCES:

1 THE ECONOMY — As long as anyone has tracked it the economy has gone up and down. This is a normal cycle. Instead of blaming every issue in the practice on the economy (which we cannot control), turn inward and make sure we are answering the phone properly, dressing nicely, have a clean and friendly office, have a great website, are spending time on social networking sites, are visiting potential referral sources (we have time now!), are current with the latest techniques, are doing a great job of internal and external marketing and that we are doing all the little things that make your office THE most attractive office! Make it happen. Believe it or not, no matter where you are there are offices in your area doing great right now!

2 THE POLITICAL CLIMATE — Almost all Americans complain about the state of the country but far less than half vote! That is crazy! Get involved in the process in general on a local, county, state and national basis and involved specifically in your profession by actively helping the ADA with your time and money. Anyone can make a difference with some effort and a dash of luck. Even a nobody from nowhere Arkansas can discuss dentistry's role in healthcare reform with The President of the United States! <http://www.ada.org/prof/resources/pubs/adanews/adanewsarticle.asp?articleid=3931>

3 STAFFING ISSUES — We are told in dental school that this is the biggest headache of practice. If you believe this to be true, then it will be! Change your attitude. Hire only people with great attitudes and train them to do things the way you want them done. Get rid of the Negative Nancys and Debbie Downers no matter how great a clinical assistant or insurance expert they are

and despite the fact that, “they know everyone in town”. You will be much better off without them! Now is a great time to find top-notch people who WANT a job.

4 COMPETITION — Dentists are constantly worried about this issue and the perception is that the dentist across the street is the main source. I totally disagree. We are a commodity competing with other commodities like cosmetic surgery, 4 wheelers, Disney World and automobiles for disposable income. Stop worrying about the guy next door and focus on delivering a great service in the best possible way. Focus on the process, not the results and you will be successful beyond your wildest dreams.

5 TAXES — See above for political activity.

6 LACK OF OPPORTUNITY — Dental students are always saying there are no jobs, no room to start a new practice, no opportunity... This is not the case by any stretch of the imagination!! There is plenty of opportunity in the rural areas and less popular towns and cities across the US. If you must live on the coast or in the big city you may have a more difficult time starting

up or finding a job but if you change your mindset and pick a practice location based on need then you will find yourself on Easy Street! Once there you can hop a flight anywhere in the world you want and afford to do it right!

7 TRANSITION PLANNING — Many hear the horror stories and worry. The best thing to do is to hire the best professional you can and be committed to making the process work. If you are Dr. Buyer, be committed to learning everything Dr. Seller has to offer. Don't think you know it all and miss out on the wealth of knowledge available. If you are Dr. Seller, commit to making Dr. Buyer as successful as you are. Transfer authority, convince the patients and staff that Dr. Buyer is great by saying things like, “Dr. Buyer is way ahead of where I was at her age”. Treat Dr. Buyer like a peer and the way you would demand to be treated.

“NO MATTER THE LOCATION, STATUS OF THE ECONOMY OR OTHER ISSUES AT HAND; A GREAT ATTITUDE, HARD WORK AND A WELL THOUGHT OUT PLAN CAN MAKE YOU SUCCESSFUL.”

Focus on what you do and what you can do to improve yourself and circumstances. No one else will do it for you.

Gandhi said it best: “*We must become the change we want to see in the world.*”

Contrarian, philanthropist, rabble-rouser, thought leader, business man, loud mouth, prime mover and visionary. These are but a few of the terms used to describe Ben Burris. No matter which label you choose or what personal opinions you hold, none can deny that Dr. Burris continues to change the conversation in dentistry - especially in orthodontics. Burris is a doer with an uncanny eye for finding opportunities to improve and an unflinching resolve to pursue and implement positive change above all else. Dr. Burris graduated from The Citadel, in Charleston, SC, with a BS in biology prior to receiving his DDS from the University of Tennessee - Health Science Center's College of Dentistry in 2001 where he then completed his orthodontic residency and received his MDS in 2004. As a clinical professor at Roseman University (www.rosemanbraces.com), owner of one of the largest practices in North America, creator of Smile for a Lifetime Foundation (www.S4L.org), co-owner of The Progressive Orthodontist and The Progressive Dentist Magazines and Study Groups (www.TheProOrtho.com and www.TheProDentist.com) and key opinion leader to some of the industry's heavy hitters, Ben brings unparalleled perspective to the conversation. More than anything, Ben enjoys teaching the business of running a practice and providing real-world tips on managing a successful dental business. He loves discussing hot topics with those who agree as well as those who disagree with his point of view. He's always up for intelligent conversation and respectful debate. Ben can be reached at bgbddds@yahoo.com

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If I had a dollar for every dentist and dental team member who has rationalized disappointing performance as a byproduct of the state of the economy over the past few years, I would be writing this column from my favorite beach in Maui! Now, as much as I would enjoy spending time on a beach in Maui, I would truly much rather put an end to the myths that we are all victims of circumstances and success is beyond our control. So much time, energy, opportunity and joy are wasted in this mindset.



By Ginny Hegarty
SPHR

FAILING TO PLAN IS AKIN TO PLANNING TO FAIL

Studies show that 70% of businesses that struggle do so because of poor planning, not economic conditions. In my experience, as soon as a practice leader rationalizes poor performance as a result of conditions outside of the team's control, it is human nature for the team to take their

foot off the gas. They will literally breath a sigh of relief - "Whew, she gets it! We're trying hard and it's not our fault that there are so many openings in the schedule or that collections are down for the month". You are then all invested in this new normal that is beyond your control and it becomes a self-fulfilling reactive prophecy.

Interestingly enough, at the same time one team is accepting a new normal, the practice across the street that has decided to turn their sights inward to focus on what they CAN control rather than what they cannot, is experiencing a new normal as well, but theirs is a self-fulfilling proactive prophecy. While the majority of people claim not to like change, there is no denying that change is inevitable. It may help to remember that change on our own terms is so much more enjoyable than change that is thrust upon us.

Not only will the proactive team have better results than the reactive team, the energy level, morale and atmosphere in their practice will be upbeat, enthusiastic and alive while the other team is down, defensive and defeated. Nothing zaps the positive energy from a room like the feeling of being stuck in a situation that you cannot control. Nervousness, drama and panic get invited in and fester. Great American Industrialist and thought-leader Henry Ford taught the power of positive energy and enthusiasm when he said, “Enthusiasm is the yeast that makes your hopes shine to the stars. Enthusiasm is the sparkle in your eyes, the swing in your gait, the grip of your hand, the irresistible surge of will and energy to execute your ideas.” Enthusiasm is an essential ingredient of success.

Now is also as good a time as any to revisit Winston Churchill’s wisdom “Those that fail to learn from history, are doomed to repeat it.” Science has the skinny on what motivates people; business simply won’t embrace it. Every business owner can make this choice on his or her own and reap the rewards of this science any time they are ready to take the plunge into strategic planning and engaging intrinsic motivators.

Jeff Besos, founder, President, CEO and Chairman of the Board of Amazon spends four hours every Tuesday on Strategic Planning – not on operations or budgets, but on Strategic Planning. It sure does seem to be paying off for him. According to Forbes, Amazon’s shares “defied gravity” in 2011, jumping 55% and adding \$6.5 billion to his net worth. I’m guessing that most dentists don’t spend four hours per year on Strategic Planning – herein lies a tremendous opportunity for the savvy dentist.

INTENSE MYOPIA

As you prepare to do your Strategic Planning, you must first establish your leadership position. Do you believe that people are intrinsically or extrinsically motivated?

We’re all very familiar with the carrot and the stick approach to motivation. Most businesses are structured on the belief that human beings are fundamentally inert &

passive and can only be motivated by an elaborate system of rewards and punishments. Strange, people don’t admit to being that way themselves, but they feel it’s true about everyone else!

Best selling author of *Drive*, Daniel Pink believes this is fundamentally a wrong assumption that has lead business to ignore science for over 40 years. He believes simply watching a toddler at play easily disproves this premise and supports that “the default setting for human beings is active and engaged, not inert and passive.” Yet, rather than follow the science and tap into our intrinsic desire to engage, rewards and punishment, carrots and sticks prevail as the most popular means to motivate an manage employees to achieve consistently great performance. As a result, business leaders continue to scratch their heads and wonder why they don’t achieve their desired results.

An iconic example of using sales incentives and punishments to ignite results can be seen in the 1992 film *Glen Gary Glen Ross*. Rolling Stone described the film as “a brilliant dark comedy that doesn’t just dazzle, it stings.” The incredible cast included Al Pacino, Jack Lemon, Kevin Spacey, Ed Harris and Alec Baldwin. I can attest that the story and the acting were compelling enough to reel me in; but I still vividly remember being exhausted and feeling like I had been beaten up after watching this movie. You may recall Alec Baldwin, the film’s “alpha dog motivational sales person” announcing “We are adding a little something to this month’s sales contest: First prize is a Cadillac Eldorado, Second Prize is a set of steak knives and Third Prize is “you’re fired!” Those are some sharp sticks that eventually had the sales force resort to criminal behavior as they marched to the beat of “A-B-C - Always-Be-Closing”.

The average workplace has evolved since 1992 and most businesses have adopted a kinder, gentler approach to motivating the team. Unfortunately, most still focus on the extrinsic reward rather than the intrinsic and most teams still underachieve. When talking with new clients, one of the greatest frustrations they express to me is that the bonus system they have in place is taken for granted and is no longer achieving the desired effect. In some cases, the team will make the case that even though they didn’t achieve the goal, they should still receive the bonus, because they have come to count on that money to live. In other cases, the bonus is the only means for team members to realize any raise in income and because bonus is not being reached, it has not only become a de-motivator, it has completely deflated team morale. The impact goes far beyond bonus and has a disastrous effect on productivity, profitability and team retention.

TURNING TO SCIENCE

When the team is no longer motivated to earn the bonus and the practice owner has come to resent the bonus, it's crystal clear that the bonus is not working for anyone. Still, some doctors are looking for the next generation bonus system that will magically make it all better. They are doomed to repeat history if they don't learn the lesson well that a sweeter carrot or a sharper stick is not the solution. I believe that sustainable energy, motivation and passion are intrinsic and are not achieved or sustained by extrinsic motivators. The plan, that is, the strategy needs refinement. To paraphrase Albert Einstein "We can't solve problems with the same mindset that created them in the first place."

Back in the 1930's, scientist Carl Duncker conducted experiments, the most famous of which was "The Candle Problem" (Google Candle Problem) that explained his theory of Functional Fixedness that substantiated his belief that creativity was necessary in certain types of problem solving. Dr. Sam Gluckesburg of Princeton University expanded on the Candle Problem to determine if attaching a monetary reward to solving the problem would incentivize the participants to work faster. The result was that those who were offered the highest financial reward for their performance took 3.5 minutes longer to reach the solution. Incentives are so good at capturing and focusing attention on the 'prize' that they keep us intensely focused on running toward the solution, missing outside creative opportunities for a better solution. This singular focus is also responsible for some people losing their moral compass and having lapses in judgment as they focus entirely on a singular result. This is certainly an interesting study that sheds great light on some of the business fiascos we've witnessed of late.

Additional experiments at M.I.T. [The Massachusetts Institute of Technology] had similar conclusions supporting the notion that bonuses, commissions and incentives dulled thinking and blocked creativity when anything "beyond rudimentary cognitive skills" were required in the problem solving activity. As long as the task was simple and straightforward, the carrot reward system worked beautifully. Once creativity was required, the carrot slowed down results. It created what Pink calls an intense myopia that has you fixated on the carrot, boxing you in and keeping you from recognizing lateral signals. Consider that technology has automated most of our rudimentary tasks and we are all required to engage creatively to achieve results and you will understand just how groundbreaking these conclusions are.

THE PARADOX OF MOTIVATION

In another interesting study at the Art Institute of Chicago, some students enrolled simply because they loved art and enjoyed the creative process, while others wished to make their living as artists. Checking in with these students twenty years later, researchers found that about half of the students had become successful artists and had their work hanging in galleries and even in museums. This half was made up almost entirely of those who were intrinsically motivated; they were not seeking extrinsic rewards, it was the byproduct of their passionate commitment to their art. The Paradox of Motivation is that the most direct way to achieve extrinsic rewards is not to seek them.

Back in the early '90s I worked with a hygienist we'll call Jayne. The doctor who owned the practice had decided he wished to encourage an ownership mentality in Jayne and he shifted her to a commission-based pay structure, thus paying her essentially like an associate. He built in a six-month security blanket assuring her that her compensation would not fall below the level she would have earned had she been paid on an hourly basis. Still, Jayne was nervous.

As I observed her on day one of this new pay system, Jayne had a small calculator in her jacket pocket. After each patient I saw her do her calculations and keep a running total of what she had earned throughout the day. Mid-morning I called Jayne aside and asked her to please take a leap of faith with me and put the calculator away. I challenged her to keep her focus on doing the very best she could for every single patient, to treat them as she would treat her own mother or her own husband. Keeping her focus on providing exceptional care i.e., doing the right thing, for the right reasons would bring her success on every level.

Jayne was an exceptional hygienist and a good person who took great pride in her work. That year she earned more as a hygienist than she ever dreamed she would. She also raised the bar on the quality of care she was providing her patients because she was working with passion and purpose. Once we took the money off the table and she gained faith that the potential was there for her to be well paid for doing great work, success was within her grasp and her patients were the beneficiary of her intrinsic desire to do well.

AUTONOMY ~ MASTERY & PURPOSE

According to a 2010 survey by Simply Hired, 83% of job seekers say they would rather have a job they love than a job that pays well. Now of course, that doesn't mean

people don't value money. Money is a motivator in that you must pay people enough to take money off the table by allowing them the security to know they can pay their bills and take care of their families. Pink believes people have an innate sense of fairness about pay. What they want most is AUTONOMY ~ MASTERY & PURPOSE.

Proof of this desire is vividly found in companies like Google and Zappos. Google offers their employees 20% time – that's basically 1/5 of their time can be spent pursuing projects and new ideas they are passionate about. This is, by all accounts more of an attitude than a strict measure of time spent. The culture works because the team also shares other core values around time, purpose and impact. It also works because it is more driven by individuals than by management. Innovations like Gmail, Google News, Google Earth, Google Sky and Google Talk are all the result of 20% time. Google also retains the intellectual property rights to all of these innovations.

20% time isn't so new – it was actually practiced by 3M during the 1950's and was known as 15% time. Masking tape and Post-it Notes were the results of this core value initiative. Once again we see proof that change over time doesn't require that you leave the past behind – take the best ideas with you, such as the 3M idea and as Google did when they gave their employees the AUTONOMY to engage their creative ideas.

Dan Pink is among the thought leaders such as Harvard Psychologist Dan Gilbert and Dan Ariely in his book *Predictably Irrational - the Hidden Forces That Shape Our Decisions*, that are delving into the treasure trove of scientific evidence that supports a belief that human nature is not as predictable or as traditionally logical as it was once thought to be. How many people would have predicted the open source movement? Both Pink and Ariely ask who would have thought that technically sophisticated workers who have full-time jobs would take on mastery of a new challenge on their own time for no financial gain, and would give it away rather than sell it, simply because they enjoyed doing it? How else can you explain Linux, Apache, and Wikipedia? The authors go on to question why people take up learning languages or playing musical instruments on the weekends. The reasons repeated over and over again in their research are “for the challenge, because it's interesting, to achieve MASTERY, precisely because it's self-directed and to make a contribution.”

The third ingredient in the shift to understanding and tapping into our intrinsic drive and incorporating it into a strategic plan is to help your team to see the meaning, the PURPOSE in their work. When I meet with a team the first time, I ask them to tell me the most important role

they play on the team. Inevitably, the focus is much too narrow and the responses are all position driven: I'm a hygienist, I'm an assistant... my favorites are the ones who identify themselves as a piece of furniture when they say “I'm the front desk.” Wow, we really need to elevate some team members' self-images!

I recently challenged a team to define their role, their purpose and what they do without using any of the words found in their job descriptions or titles. Try it with your team. It's actually a lot harder to do than you might think. As the doctor and his assisting team took on this challenge, the sterilization assistant said, “I guess you could say I'm just the cleaning lady.”

You would all have been so proud of this woman's colleagues who jumped in and redefined her role in the practice for her. By the time they were finished, this sterilization assistant told me “By doing her work well, she supports every patient and the success of every member of the team. She also prevents patients from getting sick and so she saves lives.” What a special transformation as this woman realized, maybe for the first time, that she was a critical part of this team. There truly was a physical transformation and I could see Franny walking taller with an air of confidence and a smile a mile wide on her face. You see, passion, purpose and a strong desire to make a difference through meaningful work can change the world.

Bloomberg Business Week's Annual Report of Customer Service Champs has Zappos' customer service rivaling that of The Four Seasons and Ritz Carlton! Anyone who thinks that Zappos is in the business of selling shoes would never have imagined that a shoe retailer could evoke such great response from its customers. But those who recognize that Zappos' CEO Tony Hsieh has created a culture that focuses on delivering happiness, totally get why they are rated so high.

The title of Hsieh's best selling book is *Delivering Happiness*. Zappos focuses on hiring people who want to make a difference. In fact, when I saw Tony Hsieh speak last year, he said they offer all new hires approximately \$3,500 to quit after an initial 3-week training period. They have found that those who choose to forgo the \$3,500 have the intrinsic desire to be part of a company that is passionate about customer service. Zappos can then trust these people to consistently exceed customer expectations. Zappos doesn't use elaborate scripts, they don't time service calls; they simply direct their support team to ‘make the customer happy’. AUTONOMY, MASTERY AND PURPOSE in an environment that is fun, friendly and focused on making a difference as they deliver happiness.

Who would ever have guessed that a ‘call center’ could

be such an inspirational place to work? It defies logic – that is, the logic that is based in an old paradigm. It is the CEO, Tony Hsieh’s dream that in time, as the company evolves, people will actually forget they started as a shoe retailer and they will be known simply as a great service company. In one more positive example of history repeating itself, this is the exact trajectory that Nordstrom took to develop its current reputation as a customer service champ.

The world is waking up to this new reality as many more companies are placing a serious focus on the good work they do. The Profit Motive is being successfully paired with The Purpose Motive to create an opportunity for companies and individuals to make a living and a life as a force for positive change in the world.

Doctors, as practice owners, embracing a Strategic Planning process will support the leadership framework for all of your HR Development responsibilities and goals including Recruitment, Team Training & Development, Compensation & Benefits and Employment Law Compliance. Rather than taking on a new responsibility, the strategic planning process will actually simplify your life by providing the perfect umbrella to bring your work together with a shared purpose.

HISTORY REPEATING ITSELF AGAIN

This new paradigm of embracing Strategic Planning along with Autonomy, Mastery and Purpose is again, not new. Henry Ford was espousing these virtues in the early part of the last century. Mr. Ford died in 1947 many years before I was born, but I sure would have loved to have met him and had the opportunity to watch him think. His was a beautiful mind, as evidenced by more of his famous

quotes:

- “Before everything else, getting ready is the secret to success,”
- “It has been my observation that most people get ahead during the time that others waste.”
- “There is one rule and that is: Make the best quality of goods possible at the lowest cost possible, paying the highest wages possible.”
- “When everything seems to be going against you, remember that the airplane takes off against the wind, not with it.”
- Thinking is the hardest work there is, which is probably the reason so few engage in it.”
- “A business that makes nothing but money is a poor business.”
- And my favorite, “You can’t build a reputation on what you are going to do.”

You might be tempted to say Mr. Ford was full of “good, old-fashioned common sense,” but his philosophy is quite similar to the advice offered by our scientists that has been, as Daniel Pink puts it “This body of work on contingent motivators is the most robust findings in social science ... and the most ignored.” Funny that Henry Ford & Dan Pink have so much in common; even more fun that in light of this, Dan Pink’s book is titled *Drive*.

There’s nothing common about this sense at all – yet it holds great promise for those who will embrace it. The choice is yours.

I’ll leave you with one more ‘Fordism’, perhaps his most famous:

*“Whether you believe you
can do a thing or not
you are right.”*

Ginny is best known as a turnaround expert specializing in practice renewal as she leads new teams or teams that have plateaued to rediscover and build on their strengths. She has worked as a patient care coordinator, financial coordinator, treatment coordinator, hygiene coordinator, office manager and practice administrator, in addition to her work in sales and software systems integration. Now, with over 25 years of experience, certification as a Senior Professional in Human Resources (SPHR) and an extensive background as a speaker, writer, and consultant, Ginny Hegarty, owner and President of Dental Practice Development, Inc., is recognized as a leader in the dental community. Clients describe Ginny as “a master communicator, a management strategist with a keen eye for analyzing practice data and identifying where your purpose and focus must be, and a caring, personable, upbeat motivator.” Ginny is a visiting faculty member at The Las Vegas Institute for Advanced Dental Studies (LVI). She has published articles in numerous trade journals and serves as the HR content advisor for The Progressive Dentist Magazine. Ginny also lectures at the Kornberg School of Dentistry, at Temple University in Philadelphia as part of the Practice Management Program, and is the President-Elect of the Academy of Dental Management Consultants. Ginny describes herself as “Passionate about empowering dentists and their teams to improve their practices and their lives.” www.ginnyhegarty.com ginny@ginnyhegarty.com

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