

Are You Part of the Team?

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By Cathy Sundvall

As a Practice Enhancement Consultant, team members have often asked me: “What can I do to increase my value to the practice?” I usually answer with the question: “Do you have the desire to increase your knowledge, skill and ability to become a great team player in your practice?”

You have the opportunity to increase your value in the practice, regardless of job title. This can happen with each task you complete, every patient that you encounter to each phone call you answer as an opportunity to “do your best”. Moreover, by doing your best, you **feel good about yourself and have added value to the practice.**

As you increase your value to the practice, there are increased opportunities for financial rewards, personal job satisfaction, respect from your doctor and other team members. We all want to feel that we contribute to the success of our practices. Below are a few steps that will help guide you to being “your best”.

Step #1 – Take Initiative

Recognize your responsibility to make things happen.

We know what we should do, but we sometimes fall short to take the necessary steps to make it happen. Often we are uncomfortable taking the initiative to make changes in fear that we might fail.

“I don’t have the time to learn to understand and use our computer software program to its fullest extent.”

“How can I learn more about orthodontics?”

“I don’t have any idea how to make a contest flier using Word.”

“I don’t have time to reorganize the files and purge old retention patients.”

Typically, we wait for something to happen in the practice or for someone else to tell us what to do and how to do it. How about the next time you see a problem or issue that you come up with a solution? Seize the **initiative** to do whatever is necessary to get the job done.

“I don’t have the time to learn to understand and use our computer software program to its fullest extent.”

“Once a week for the next three months I am going to spend 30 minutes on a non-patient day to learn something new on the computer.”

“How can I learn more about orthodontics?”

“Dr. Smith, I and some of the staff would like to understand more about the mechanics of moving teeth and why you choose specific appliances to treat crowding, Class II and expansion cases. Would it be all right to schedule one hour once a month for you to teach the staff? I will get with the rest of the team and set a schedule and agenda for the topics we would like to better understand.”

“I don’t have any idea on how to make a contest flier using our computer system.”

“I am going to sign up at my local Junior College and take a computer course. The class is every Tuesday evening for the next six weeks. Does anyone else want to go with me?”

“I don’t have time to reorganize the files and purge retention patients.”

“Next Thursday afternoon we don’t have patients scheduled. I would like to start purging old retention patients and reorganizing the files. The process would go quicker if I could have a volunteer. Is anyone available to help me?”

Step #2 – Put First Things First

Prioritize your week and then your day. Patients come first.

First, write down the tasks, projects or goals you want and need to accomplish for the upcoming week on a clean sheet of paper, computer print out or in your day planner. Putting these items on paper gets them out of your head and in front of you. One list gives you a clearer picture of the total amount of work to be done and allows for better scheduling. Fewer things will slip through the cracks.

Example A:

- Check the clinical inventory and order as needed
- Write 10 “special notes” to patients
- Clean and re-stock the operator
- Train our new sterilization technician
- Track all debanding for the weekly operator statistics

Second, look at the week with your goals in mind. Schedule time to achieve them, realizing that on any given day the schedule and your priorities could change based on the patient flow and needs of the practice. If you can develop a pattern of scheduling specific tasks at a certain time daily, weekly and monthly, you will increase the chances of getting them done due to “making a habit or establishing a routine”.

Example A continued:

You are a chairside assistant and see patients all day long. This upcoming week you are scheduled to work Monday-Thursday, seeing patients. Thursday afternoon is non-patient time and you are off on Friday. Do not wait until Thursday afternoon on your non-patient day to schedule all your "to-do" tasks. You never know what tomorrow will bring and if you put off today, you may not get to it tomorrow.

To avoid this, your week could look like this:

- Check the clinical inventory and order as needed - find a time during the day that you could leave the operatory for 30 minutes. Typically, the time between 11:30 and 12:00 is slow and the remaining clinical staff can keep the operatory running smoothly. You write down on your weekly planner, Tuesday, 11:30-12:00 inventory.
- Write 10 "special notes" to patients - On your planner, you write in three notes on Monday, four notes on Wednesday and three notes on Thursday. The personal notes can be written in-between patients and right before or after lunch.
- Clean and re-stock the operatory – Your non-patient day is ideal for cleaning and restocking the operatory. Write down Thursday from 3:30 to 4:30 on your planner.
- Train your new sterilization technician – Training is an ongoing process that can be done throughout the day, even as you see patients. Schedule 15 minutes each day before patients and 15 minutes after lunch Monday through Wednesday. On Thursday schedule 1 hour from 2:30 to 3:30 for extensive review and training.
- Track all debanding for the weekly operatory statistics – Ask all chairside assistants that complete debandings to write down their patients statistics and turn them into you by Thursday at 1:00. After lunch on Thursday, schedule 15 minutes to compile the debanding statistics.

Example B:

You are the Treatment Coordinator and have seven exam slots scheduled a day. This upcoming week you are scheduled to work Monday-Thursday, seeing patients. Thursday afternoon is non-patient time and you are off on Friday. Your task lists looks like this:

- Call all Will Call/Pending patients from last week – Scheduled Monday through Thursday at 4:45 during the time you are confirming new patients.
- Track new patient statistics for the week – Schedule Thursday from 2:00 to 2:30
- Complete all treatment letters to the general dentists for the doctor to sign. Look for your first available block of time to complete this task. You need to have these letters generated, reviewed, signed and in the general dentist office as soon as possible. If your schedule is completely full with new

patients, use Thursday from 1:00 to 2:00 to catch up. Note: If you have any correspondence with an extraction order, this must go out on Monday. Do what ever it will take to get this in the mail.

- Confirm new patients – You are going to confirm two days prior to their appointment. Ideally, you look for time at the end of the day, when someone may be home to take the call. Schedule everyday Monday through Thursday at 4:45 to make your calls.
- Call to schedule four lunches with referring dentist hygienists. Based on these practice's office hours, you are going to schedule a call to the hygienist right before or after lunch. Write on your calendar 2 on Monday, 1 on Tuesday and 1 on Wednesday.

We are striving to keep ourselves organized and constantly reminded of our priorities for the day without falling into the trap of working on activities that are "busy work".

How many times have you had a fellow team member ask if there was something they could do? You go blank, and then you force yourself to think of a task. Would it not be better to refer to a list of priorities for the month/day/week? Keep an ongoing list of miscellaneous duties that need to be done posted in the staff lounge and sterilization room.

Third, take a few minutes each morning to review your schedule and look at the decisions you made when you organized your week. As you know, unanticipated patients, procedures or activities for the day may completely change your priorities and task list. Say to yourself, "If I could only do one item today, which would it be? Put the numeral "1" to the left of that item. Next, select the second most important item and label it "2." Continue the process labeling all items in numerical order. As you start the day, begin with the first item on the list. Complete it (around the interruptions that will inevitably come your way) and then go to the second item, then the third, etc. You may not complete the list but you will always complete the most important items. Making a "to-do" list is an important first step. However, prioritizing that list ensures that we focus on the more important items that need to be accomplished.

Step #3 – Turn a Task or Project into a “Winner”

Every task, large or small, should “shine”.

Think about your daily task and those special projects as a work of art.

At the end of the day, you are proud to sign your name on the finished product.

The Sterilization Specialist

Turn your job and work area into a “master piece”. Take pride in the way you organize your drawers and storage areas. Use your creative talents to come up with better ways to complete your task or organize your work area.

The Records Technician

You have the unique opportunity to make an *incredible first impression* on the new patient. You are delivering the first series of orthodontic procedures each patient will experience. Be a winner, do it right, make it interesting, educating and entertaining.

The Insurance Coordinator

Patients and or parents love you. Efficient and effective insurance processing helps them pay for orthodontic services. How do you make your task “shine” and become a winner? Consider what it would take for the patient or parent **not to have to call the office** with a question regarding their insurance. What are the steps you could institute today that would give them the answers they are looking for tomorrow? Is it a note card mailed to the patient or parent stating that today you submitted their insurance? Is it a monthly statement showing the insurance payment and balance?

Step #4 – Start Today to be a better YOU. These steps will help you to significantly improve your value and performance to the practice. By following these steps, you may also find *you will feel more productive and less stressed* each day.

“What we do matters to us. Work may not be the most important thing in our lives or the only thing. We may work because we must, but we still want to love, to feel pride in, to respect ourselves for what we do and to make a difference.”

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