

MANAGEMENT & MARKETING

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This is the fourth year in which I have presented at least one column written by orthodontic staff members from practices around the country. This time, however, the format is slightly different. At last year's AAO meeting in Philadelphia, I noticed a roundtable being presented by six staff members from Dr. Gilbert Snow's office in Palmdale, California. Therefore, instead of featuring ideas from different offices, this month's column includes sections by three members of Dr. Snow's team. I think you will find an unusually perceptive and sophisticated approach to the basics of management and marketing that makes their practice as productive as possible.

The first article, by Charlene Gale, describes how to formulate an effective marketing strategy. If you start by selecting an overall treatment profile and then base your strategy on thorough research, you will be able to direct your energy to meet your goals. Ms. Gale underlines the importance of a detailed marketing budget and the constant measurement of each area. She also reminds us to be open to new ideas.

In the second section, Mary Kay Etlinger discusses the various methods of staff communication used in Dr. Snow's office. Her point that interpersonal problems must be resolved as quickly as possible, in the daily huddle, is well taken. She also describes a technique called the Circle Meeting, in which staff members discover and share their emotional realities. I want to emphasize that this kind of interchange has much to offer, but can produce negative results unless it is initiated by someone with experience. You would probably want to have a trained consultant conduct the first few meetings.

Wendi Riddle's article describes a staff management tool used by Dr. Snow: the performance review. I have found that this kind of regular evaluation, in which staff members fill out their own review forms, can be effective in improving communications and staff performance.

Dr. Snow and his staff obviously work as a true team to maximize their marketing efforts and create a pleasant work environment. I would like to thank them for taking the time to produce this column.

Are Your Marketing Strategies Producing Results?

CHARLENE GALE

Organization and creativity are the major necessities for developing a marketing plan. Organization begins with identifying your marketing goals, which begins with identifying your target audience. What patients are you trying to reach? Children only? Children and adults? Managed care?

At Snow Orthodontics, we decided to treat both children and adults, with an emphasis on early intervention and creative financing. Our marketing strategies were then established as follows:

- Present a class act to the Antelope Valley. Conduct marketing in a professional and dignified manner, using a mix of television, radio, and newspapers.

- Stress preventive orthodontics for children, beginning with the first eruption of permanent teeth (unless there are habits or deformities that should be addressed even earlier).
- Promote adult orthodontics. Create an esthetic, pleasant experience surrounding the delivery of care.
- Emphasize external promotion to other dentists, physicians, and schools. Maintain high visibility in the community.

Marketing Preparation

After setting an overall strategy, invest some time in researching the local media and any other avenues of marketing that could benefit your practice. Find out not only the advertising rates, but everything the various outlets have to offer. Prepare a resource list of news media and contacts. Getting mentioned in the local papers and on radio talk shows can be a great boost for any practice, and it doesn't have to involve great expense if you've taken the time to get to know the right people. Be sure to review your marketing effectiveness by constantly tracking your media list.

The next vital step is to prepare an annual budget. About 2-4% of gross collections should be adequate for any practice's marketing efforts. Break down your budget by month and category (Fig. 1).

If you've done your homework, you will know which times of year are most effective with which types of marketing. For example, we spend more in February and October, because we know from past tracking that more new patients come in as a result of advertising during those months.

A budget line should always be reserved for Unallocated Funds. No matter how precise you may have been in your research, there will always be unexpected needs. Utilize these funds cautiously and wisely, but remember that the budget is only a guideline and that adjustments will be needed.

Conclusion

The key to measuring the success of any marketing plan is accurate tracking of referral sources. If a particular segment of your strategy isn't working, you need to know right away so you can shift your focus to another area that is producing great results.

Don't forget to be creative and open to new ideas. In 1998, our office has decided to try direct mailing, twice-monthly school screenings, and increased exposure at community health fairs.

Opening and Maintaining Lines of Communication

MARY KAY ETLINGER

Communication is the foundation of any relationship, whether personal or professional. Successful communication among staff members and with patients demands continual maintenance and fine-tuning. The following are some of the methods we use regularly to keep interoffice lines of communication open.

Staff Meetings

All staff members and the orthodontist gather at the beginning of each day for a "Morning Huddle". At this meeting, we discuss the schedule for the day and any anticipated treatment problems. We set

daily goals, such as the number of new patients to start treatment that day or the number of records appointments. At the end of the meeting, we check the wellness of the team and make sure everyone is ready to start the day.

The "Evening Huddle" is an update for the staff and doctor on what actually happened during the day. It should last no longer than five minutes. We review how many patients were actually seen; the emergencies, broken appointments, and cancellations; and how well we met the goals set at the Morning Huddle. The doctor leads a discussion of what we could have done to make the day run more smoothly, and asks whether there is any problem that someone needs to clear up with someone else. To minimize staff conflict, it is best to address such matters as soon as possible.

At least once a month, we meet for a "Brainstorming Business Meeting". This is used to discuss business and patient policy concerns and to develop new ideas. Examples of areas covered include how to prevent lost charts, how to increase staff involvement in the community, how to improve patients oral hygiene, and how to keep the schedule running on time. Once an idea is adopted, we formulate a plan as a team to make it work.

Twice a month, we conduct a "Circle Meeting", a process introduced to us by management consultant Sonny Elliott. The purpose of this communication technique is to help individuals become aware of and express their emotional realities, while being open to hearing the emotional realities of the others. The Circle Meeting allows us to categorize our many feelings, thoughts, attitudes, and behaviors, and to sort them out so we can perceive them more clearly (Fig. 2). It helps us see the effects of our behavior on others, as well as the effects of their behavior on us.

Conclusion

For orthodontic staff members to be happy and fulfilled, they need a sufficient level of acceptance, caring, esteem, love, and respect from the people around them. Clear and effective communication permits the entire team to have more understanding and control of their situation, so they can behave in ways that are constructive for themselves, their peers, the patients, and the practice.

Employee Reviews for Enhanced Communication

WENDI RIDDLE
GILBERT H. SNOW, DDS

Each position in our office has a detailed job description and training manual. The performance review is based on a comparison to the job description. We review each employee after six weeks, after 90 days, and then twice a year unless an earlier review is needed.

The staff members fill out their own Performance Appraisal Forms (Fig. 3). In addition, their coordinators rate them from 1 to 5 on every responsibility listed in their job descriptions.

The employee meets with Dr. Snow to go over each responsibility. She has the opportunity to discuss any job-related problems and review action plans for improvement. Suggestions for improving communications between the employee and her coordinator are also discussed. □

FIGURES

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Advertising													
Newspapers	200	200		200	200			200	200	300	200		1,700
Television		1,000				1,000				1,000			3,000
Radio		700	300	300	300		300	300	300	700	300	300	3,800
Directories	350	350	350	350	350	350	350	350	350	350	350	350	4,200
Web Site Updates	50				50				50				150
Direct Mail		2,550											2,550
TOTALS	600	4,800	650	850	900	1,350	650	850	900	2,350	850	650	15,400
Business Relations													
Networking	10	10	10	10	10	10	10	10	10	10	10	10	120
Chamber of Commerce	80	15		15		15		15		15			170
Board of Trade	125		15		15		15		15		15	15	215
TOTALS	215	25	25	25	25	25	25	25	25	25	25	40	505
Community Relations													
Sponsorships	100			100			100			100			400
Health Fairs	200												200
TOTALS	300			100			100			100			600
Dentist Relations													
Muffin Runs	100			100			100			100			400
Misc. Cards/Notes		25				25				25			75
Presentations	300												300
TOTALS	400	25		100		25	100			125			775
Patient Promotions													
Patient													
Appreciation Day					1,000								1,000
Bulletin Boards	10	10	10	10	10	10	10	10	10	10	10	10	120
Patient Contests	100			100			100			100			400
Stickers	100				100				100				300
Coupon Items	300				300				300				900
TOTALS	510	10	10	110	1,410	10	110	10	410	110	10	10	2,720
UNALLOCATED													1,000
GRAND TOTALS	2,025	4,860	685	1,185	2,335	1,410	985	885	1,335	2,710	885	700	21,000

Fig. 1 Sample annual marketing budget, based on 4% of \$500,000 gross collections.



Fig. 2 Staff members holding Circle Meeting.

**GILBERT H. SNOW, DDS, INC.
PERFORMANCE APPRAISAL FORM**

Review Date: _____
Employee: _____
Position: _____ Time in Position: _____
Date of Employment: _____

- Objectives of the Performance Appraisal Program:**
1. Maintain or improve employees' job satisfaction and morale by letting them know that the supervisor and employer are interested in their progress and personal development.
 2. Serve as a systematic guide in planning each employee's further training.
 3. Assure a factual evaluation of an employee's performance rather than snap judgment.
 4. Provide an opportunity for each employee to discuss job problems and interests with the supervisor and employer.

Employee Action Plan:
Areas in need of improvement. What the employee can do to help him/herself. (List what/how/when.)

Supervisor Action Plan:
Action plan for improvement. What the supervisor or employer can do to help the employee. (List what/how/when.)

EMPLOYEE COMMENTS

Employee's comments on the performance appraisal discussion or any other job-related matter:

Do you have any suggestions to offer that you feel would lead to improvement in the office or staff policies and procedures?

Please list any suggestion you might have for improving the communication between you and your supervisor.

(Employee's Signature) (Date) (Supervisor's Signature) (Date)

(Employer's Signature) (Date)

Fig. 3 Performance Appraisal Form