

58 Definitive Practice Management Tips from the Leading 58 Dental Experts

1. The receptionist position is not always an upwardly mobile job, so make them feel part of a valued office culture by creating ways to earn bonuses for such things as raising their conversion rate. That's how you keep happy employees--consistent employees who help create a great culture. When that remarkable experience is happening, the patient is going to accept more treatment. When your patients are accepting the treatment they should have, you're doing what you should for the community. The practice is fulfilling its purpose. –**Fred Joyal**

[Fred Joyal](#)

2. Invest in your team. Too many times we see doctors and their team frustrated because someone was placed in a position with little or no training; or worse, continuing to do something the same (antiquated) way. Giving someone the title 'office manager' does not make them the ultimate manager, and even a seasoned manager needs to continue to stay up to date to remain relevant in the industry.

There are online courses, conferences, lunch and learns, e-zines, newsletters, magazines... the options are endless. Investing in your team is never money wasted and is often just the thing needed to take that person or that practice to the next level.

– **Denise Ciardello**, [GTSgurus.com](#)

3. Dental practices succeed and flourish when they have efficient and effective communications meetings. These

practices can strategically plan to maintain their standards and quality, keep their systems functioning, changing if need be to implement innovative technology and service changes, etc.

Morning Huddle and regular team meetings, along with defined job descriptions, task lists with ultimate responsibilities defined, team member growth conferences and merit raise reviews are critical for this. Practices that encourage and train team members so they can stretch, change, and grow, creating a well-functioning team that works cohesively toward a common set of goals will have a thriving practice.

Personnel determines the Potential of the Team. Vision determines the Direction of the team. Work Ethic determines the Preparation of the team. Leadership determines the Success of the team.

– **Cindy Ishimoto**, CindyIshimoto.com

4. Develop Policies Procedures for Staff Accountability and Consistency.

– **Dr Paul Caselle**, DrPaulCaselle.com

5. Know how to be a leader, complete with a clear vision, an ability to delegate and hold your team accountable, and the ability to foster creativity and leadership in your own team members. I have seen many skilled clinicians without the ability to maintain business as successful as it should be.

In my opinion, practice success centers around leadership. Seek resources to equip yourself to become a strong leader and never stop learning.

– **Karen Davis**, KarenDavis.net, [@karendasa](https://twitter.com/karendasa)

6. Always have a continual training protocol in place in your practice as a well-trained, efficient office is a maximally profitable one.

– **Laura Hatch**, FrontOfficeRocks.com, [@dentalrockstars](https://twitter.com/dentalrockstars)

7. Most front office managers are too busy to answer the phone 100% of the time. If you're paying for marketing services, be sure to keep track of how many calls you're missing. You're paying for those calls. Establish a system to follow up on calls after hours or during your lunch break.

Many dental offices claim that most dedicated new patients will call back. If you are truly unique, this is true. But for dental offices who haven't firmly differentiated themselves from other offices in the area, it's critical that you answer these incoming calls.

Paying for marketing and missing calls is one of the biggest problems I see in dental marketing.

– **Justin L. Morgan**, DentalMarketingGuy.com

8. Define and assess your leadership role in the practice and get coaching if you are weak in this area. Establish strong systems for recall, collections, and scheduling with policies that all staff understand. Provide a legal Employment Policy Manual that eliminates or reduces misunderstandings about holiday pay, maternity leave, overtime, dress code, cell phone use, and body tattoos (to name a few).

Have positive team meetings monthly. Check the office financial reports daily and meet with your front office monthly to keep track of production and collection statistics. All adjustments to accounts need an explanation. Stay connected and don't give away your responsibility as CEO.

– **Belle DuCharme**, BelleDuCharme.com

9. I believe the biggest area of potential in dental practices is in executing their action plans. Execution is the missing link to achieving the practice you desire. Execution happens when you are clear about your goals, the strategy to achieve them, opportunities to communicate daily and hold one another accountable. You will create the practice you dream of when you can ensure successful execution.

– **Jennifer Schultz**, TheAchievementBlueprint.com,
[@Jen_Schultz](https://twitter.com/Jen_Schultz)

10. The best advice I can give to dental practice owners is to send **direct mail** to generate new patients. And I don't just mean one big drop of postcards when things are slow. I'm talking about consistently mailing to your prospective patients — whether it's 1,000 or 10,000 postcards a month (depending on how many new patients you need) — to keep a steady stream of them calling in.

A lot of dentists today are blowing their whole marketing budget on pay per click, but it's not enough! Only a finite number of people are searching online for a dentist at any given moment. But who needs the dentist? Everyone! You need to reach prospects in your area regularly so that when the need is near, your practice is top of mind.

– **Joy Gendusa**, PostcardMania.com, [@postcardmania](https://twitter.com/postcardmania)

11. In regards to hitting your goals: Approach each day at the office like your going to WAR.

– **Dr. Justin Short**, TheLifestylePractice.com

12. Invest in Your Team- Hire for maturity (not age but demeanor). Take the time to teach them your culture and train

accordingly. Treat them as assets – not liabilities. Tell them your top 5 values and clearly outline expectations. Teams who perform well understand practice objectives and act accordingly.

– **Debra Engelhardt Nash**, DebraEngelhardtNash.com

13. While there's nothing better than being surrounded by a great team that supports your practice's mission, the next most important part in the business of dentistry? Never stop marketing! An abundance of new patients can solve a lot of problems. What's more, don't ignore your existing patients. They need to hear from you every month and know you care (In writing. Be in their mailbox each month like no one else!). In every new patient ad, include an incentive for existing patients. We've had as many as 50% of the calls from a new patient ads come from existing patients mentioning the incentive (moderate, under \$50 off). It prioritizes treatment that has been put off and generates new patients, too.

– **Jerry A. Jones**, JerryJonesdirect.com, [@jjdirect](https://twitter.com/jjdirect)

14. Dentistry is one of the most inventory-intense professions. Inventory cost should not exceed 6% of your gross, so it's vital that you control it with an inventory management system that provides you with metrics, as well as control over: min/max levels, expiration dates, tracking returns and promised free goods, and your equipment.

– **Kim Bleiweiss**, ghMouse.com

15. Think like a big business. Ask yourself – how can I create maximum efficiency in my practice, lower costs, and create an incredible new patient experience? Small dental groups are

doing this well. The practices who figure this out too will survive and thrive.

– **Jacob Puhl**, DEODentalGroup.com

16. Become the strongest leader you can be. As a strong leader, you will be able to create strong leaders within your team. This will propel your practice to new heights and will make running your practice so much easier ... less stress and more enjoyable!

– **Robin Morrison**, DentalConsultantConnection.com

17. Take a two-day course in medical billing. Help your patients pay for treatment and minimize out-of-pocket expenses.

– **Dr. Olya Zahrebelny**, TheZGroupLLC.com, [@thezgroupllc](https://www.instagram.com/thezgroupllc)

18. Even though there is lots of technology to make it easier to run the numbers, dentistry is still very much a people business. My best advice would be to invest the time and energy it takes to get great people on your team: empower them with the training they need and ensure they are committed to the success of the practice.

There are lots of ways to improve a practice, but staff changes for the better are what I've seen make the most difference to the owner's income, as well as to their quality of life.

Get the people right, and the rest will follow!

– **Ciara MacMahon**, PhaseTwoManagement.com

19. Set up a professional dental corporation or professional limited liability company. This will help protect your personal assets from liability that may arise within the practice. In addition, there may be tax benefits and savings depending on the type of entity you choose.

– **Matthew Odgers,** OdgersLawGroup.com/california-dental-attorney/, [@OdgersLaw](https://twitter.com/OdgersLaw)

20. Keep your fire burning bright by constantly learning, improving, and reaching for that next level of success.

– **Sandy Baird,** BairdConcepts.com, [@bairdconcepts](https://twitter.com/bairdconcepts)

21. Track where your new patients are coming from!

– **Laura Maly,** WonderistAgency.com, [@wonderistagency](https://twitter.com/wonderistagency)

22. Concentrate on what you can control within the four walls of the practice.

– **Kevin Tighe,** MyDentalConsultant.com, [@myddsconsultant](https://twitter.com/myddsconsultant)

23. The language you use on your practice's social media page will reflect your message of how you and your patients view your services. For example, what words are you using to describe your dental hygiene visit? Cleaning or Health & Wellness Visit? I challenge you to hashtag the word cleaning and the word health ... then discover why your patients may not view the value of the dental hygiene appointment.

It is easy to cancel an appointment when you view it as a cleaning. Given the fact that periodontal disease carries risk, oral cancer, bruxism and more are linked to or stem from health, this repositions the expectations of your practice.

– **Anastasia Turchetta,** AnastasiaTurchetta.com, [@AnastasiaRDH](https://twitter.com/AnastasiaRDH)

24. The root of many practice management issues is the lack of control; learn to gain control and you will have success at your office and have your teamwork WITH you instead of AGAINST you.

– **Tuan Pham**, DentalMaverick.com

25. Blatchford Solutions holds the basic philosophy.....Your LIFE is most important. Our coaching encourages you to discover your own dreams and values in achieving a lifestyle meaningful to you. We then help you develop a practice congruent with the life of which you dream.

Many dentists work hard, yet do not feel the emotional or financial satisfaction they had hoped. We coach dentist to dentist and support you in rediscovering joy in life and rewards in practicing. We have many Doctor and team testimonials on our website, www.Blatchford.com.

Bottom line, live the life you deserve and want. Get off that hamster wheel!

– **Dr. Christina and Dr. Bill Blatchford**, Blatchford.com,
[@drblatchford](https://twitter.com/drblatchford)

26. Sell the treatment your patients need and want, and do your best to always accommodate for same day treatment or commitment. Do not put off a willing and eager patients for insurance approvals. I currently work in the medical billing field and have clients nationwide treating sleep apnea. The offices with the largest amount of volume in claims are the ones who have the patients commit to treatment and sign off on financial responsibility.

The offices overly concerned about pre-authorization and telling patients what they expect insurance to cover have a lot of volume in pre-authorizations, but do not translate to claims for completed services.

– **Lesia Crawford**, GoGoBilling.com

27. Managing yourself, your emotions, and understanding why you react the way you do is the most impactful part of managing your practice. Change that matters always starts from the inside-out. Anything else only makes a temporary shift. I know this because as a dentist for 20 years, I was making all kinds of outside changes to try & improve my life & practice. I changed employees, spouses, vehicles, office buildings, technology...and none of it made a lasting impact until I started working on myself, and then the lens through which I saw the world shifted, which changed everything. I had a coach to walk with me, but the most impactful guide was my horse...

Contact me for more information on how a horse can help guide you in making changes that matter, from the Inside-Out!

– **Bethany Piziks Gareiss, DDS,**
BraveHeartEquineCoaching.com

28. You have more power with PPO's than you think. If you are collecting less than 80% of your gross production chances are you can do better through either negotiating with PPO's or selectively dropping them.

– **Bill Rossi,** AdvancedPracticeManagement.com

29. Most dentists have a hard time building up wealth outside of their dental practice. You should focus on building up your personal net worth so you can take care of the people you love and support the causes you care about.

The first step is to make an honest assessment of where you are now, where you want to go, and what the gaps are.

Second, we recommend looking to your existing financial and other advisors to make an honest assessment of whether you have the right team in place. Sometimes this may mean they

need to bring additional advisors to the table. Or it could mean you need to change advisors to help you reach your goals.

In today's market environment, a lot of dentists are not sure that they're making the best decisions with their wealth and that the steps they are taking now will actually help them get to where they want to be. Think of it this way: If your doctor told you that you have cancer and wants to operate tomorrow, you'd probably seek a second opinion.

Why should it be any different with your wealth and your dental practice? If you're not sure that you're making the best decisions, a second opinion could give you a lot of insights about how to take a new direction that could be much better than where you are headed today.

– **Timothy J McNeely CFP® CIMA®,** LifestoneWM.com,
[@timmcneely](https://twitter.com/timmcneely)

30. Create a website that has dental content that connects with your website visitors emotionally. Then optimize it for higher rankings in Google. Remember...people make decisions on emotion, so speak to them on that level on every page of your website.

– **Mike Pedersen,** TheDentalBoost.com, [@mikepedersen](https://twitter.com/mikepedersen)

31. The golden rule...treat others as you wish to be treated. As simple as it sounds, we all get very busy and overlook the small details that make such a difference in the competitive world of dentistry. Taking time to answer questions fully, give your full attention to the patient in the moment they are in front of you and empower them through education to take responsibility for their oral health and overall health. I also learned a long time ago that a fee guide is only a guide; your patients will pay for

quality and service. Make sure you and your team are focused on both.

– **Jo-Anne Jones**, Jo-AnneJones.com, [@Joanne_RDH](https://www.instagram.com/Joanne_RDH)

32. Your clinical aptitude will be equal to your financial outcome! Develop your skill set & be a life leader.

– **Rhonda Gonano Mullins**, DentpreneurSolutions.com, [@Rhomullins](https://www.instagram.com/Rhomullins)

33. Track at least 5 key practice performance indicators each month. For example, net production vs. collection, dr. production vs. hygiene production, new patient flow, case acceptance percentage, and cancellations and no-shows. Understand how this information compares to your practice benchmarks and dental practice averages.

– **David J Goodman CPA**, LBGCPAS.com, [@njdentalcpa](https://www.instagram.com/njdentalcpa)

34. Engage dental professionals to help you with managerial decisions.

– **Allen Schiff, Dental CPA**, SchiffCPA.com, [@CPA4DDS](https://www.instagram.com/CPA4DDS)

35. Do you HAVE to do dentistry or do you have the FREEDOM to do dentistry when you choose to? Most dentists don't really own their practice, their practice owns them. What if you could build a practice you love and have a great life, too? Why do we think you have to pick one over the other?

We all need to learn The Practice Owner's Game – how to make MORE money in LESS time and get off the treadmill of dentistry. We get off the treadmill by leading instead of managing. People don't need to be managed, just led; vastly different things (ex: Managers "tell", Leaders "ask"). Figure out what is the highest

and best use of your time, and lead other people to their highest and best.

Very few people in your practice (maybe including you) are in their groove. 51% of staff have their resumes out right now (Gallup), and a whopping 84% would rather be doing something else. The biggest reason they give is that they can't be an adult and make decisions. Your highest and best is not to make decisions for them but to have the vision to know where you're all going, and then provide the tools, resources, training, and encouragement to allow them to make the great decisions that get you there.

Are you making decisions based on where you are, or on where you want to be? Decide today to get off the treadmill, unleash the latent potential of those around you to make great decisions and lead from their strengths, and build a practice that everyone would love to buy, but you would never want to sell.

You get what you intend, not what you hope for. What are you intending to build?

– **Chuck Blakeman**, GOTTSummit.com, [@chuckblakeman](https://twitter.com/chuckblakeman)

36. Ensure that the whole team is professionally trained in ethical sales & world class communication skills, from the receptionist right through to the doctor. You are one team and there are thousands of dollars worth of opportunities calling and walking into your office every day, your job is to ensure that your whole team is skilled up to maximise these opportunities. The second piece of advice is to ask every patient this question: is there anything that you would like to change or improve about your smile? If so what would it be? Sit back and listen attentively.

– **Ashley Latter**, AshleyLatter.com, [@latterash](https://twitter.com/latterash)

37. Implement systems and training along with regular team meetings to allow your vision to become a reality

– **Amy Smith**, AmySmith.biz

38. There are four primary tasks of management in your practice. In order for you to provide a service and take home a paycheck for your work, these four tasks need to be accomplished to make your business go.

Task B – Tasks of Production—Task B actions, can most easily be defined as the activities in your practice that create income. When you're prepping a tooth you're working on a Task B activity. When any team member is performing a task for which you will bill a client they are involved in a Task B activity.

Task C – Tasks of Support—Task C actions, are those tasks that directly support the creation of income. When your receptionist is making an appointment she is working on a Task C activity. When you're taking a continuing ed course you're involved in a Task C activity.

Task D – Tasks of Maintenance—Task D actions are those tasks that do NOT directly support or enable the creation of income but must still be done in order to maintain the practice. When your assistant takes out the trash or your office manager orders supplies they are engaged in Task D activities.

Most practices operate on a Task B-D level. Dentists operating on this level can create income and jobs and provide services. They can get the job done but something important is missing. That "something" is the job of Task A.

The Job of Task A

The job of Task A is the job of leadership. The dentist is the practice leader. You can certainly produce income (Task B), perform the jobs that support the production of income (Task C), and can even maintain the practice and keep the windows

clean (Task D), but ONLY you, the dentist, can perform the Task A task of Leadership.

A friend of mine was traveling in Germany with his wife a few years ago. He told me one day they were driving through a beautiful countryside when he saw a lone shepherd with his dog and a flock of sheep. He thought this was a great opportunity to once and for all find the answer to a question he had pondered for years.

He pulled over and walked to where he could get the attention of the shepherd and motion for him to come over. In his broken German he asked, "I have wondered for many years, does a shepherd drive his flock in front of him or does he walk ahead so they follow him?"

The shepherd using simple terms so my friend could understand him, replied, "It depends. If he is going where the sheep have been before he lets the sheep go ahead and drives them from behind. If he is going where the sheep have never been he walks in front and leads them."

The Job of Task A is the job of Leadership. In areas where the team know the processes and have the skills he or she lets them move forward and take initiative while offering support, encouragement, and persuasive guidance. If they are attempting new goals, new systems, or changes in the practice the Task A leader walks ahead, setting the example and leading the team.

The key to practice management success isn't in processes, appearances, systems, technology, or even clinical skill. It is Leadership, determined by developing the discipline to do what only you, the doctor, the owner, the leader can do. And that is the Job of Task A.

– **Kevin Nelson**, WinterSteen.com

39. Share the #1 unique, ethical service that only you provide for your patients. Share this in everything that you do and say, and you will create your dream practice. You will have patients who are raving fans, a full schedule, and patients who want to pay for what you offer.

– **Debbie Seidel-Bittke, RDH, BS,** DentalPracticeSolutions.com,
[@DPSDentalCoach](https://www.instagram.com/DPSDentalCoach)

40. You can't change what you don't acknowledge, so tracking your key performance indicators (KPIs) is vital to growing your business through strategy and intention. You can track these old school with pen and paper, or more high-tech using an analytic dashboard such as Dental Intel. However you do it, review your KPIs daily with your team and discuss your verbs; those action words determine if you stand still or move forward.

– **Jen Butler, MEd,** JenButlerPartners.com, [@JBP_SMaRT](https://www.instagram.com/JBP_SMaRT)

41. Make sure you have updated bios for yourself and your team on your website. These are the No. 1 and 2 pages prospective patients look for and read when researching a new dentist. If your bio is non-existent or poorly written, with outdated, grainy photos, your chance of that person calling your practice to schedule a new patient appointment is slim to none.

– **Jill Townsend,** WriteAGreatBio.com, [@JillTownsend](https://www.instagram.com/JillTownsend)

42. Don't try to solve your problems personally...Hire a coach

– **Hugh Dohrty, Busines of Dental Practice LLC**

43. Attracting new patients, and retaining existing ones is vital to the long-term health and profitability of any dental practice. And yet, despite how hard you work to do just that, many

patients simply fade away over time, never to be heard from again.

Why? What is it that you are doing, or not doing, or could be doing better that causes this to happen? Chances are it has nothing to do with your skills as a clinician. More likely, you and your staff are not effectively following the three “C” rules that help keep patients engaged and invested in their oral health:

- Customer Service
- Communication
- Continuing Care

If you want your practice to succeed, learn how to ensure you are providing excellent customer service to every patient in every interaction, that you and your team’s communication skills are not only adequate but exceptional, and that you have a continuing care program in place that is understood and embraced by all.

– **Jan Keller**, JanKellerAssoc.com

44. Change is constant. The changes due to the rapid expansion of DSOs, Big Data, Artificial Intelligence, evidence-based diagnostic and treatment planning software, machine to machine learning, robotics, different values and attitudes of consumers and dentists, midlevel providers/dental therapists, the oral-systemic link, vertical integration through the value chain, and change in reimbursement from fee for service to outcomes and value, dental practice as you know it will look nothing like it does today in less than a decade.

My advice is to stay calm, be highly flexible, and get ready for these changes.

– **Dr. Marc B. Cooper**, DEODentalGroup.com

45. All practices should be growing each year by a minimum of 15-20%. if that's not happening, assess your management systems and apply the 3 rules of CHANGE...

If something is working celebrate and DO MORE of it...

If a system is NOT working – stop the insanity and DO something DIFFERENT

If you don't know if it works or not, analyze and FIND OUT...

– **Lisa Philp**, TGNAPracticeManagement.com, [@TransitionsG](https://www.instagram.com/TransitionsG)

46. At the end of the day or evening call every patient that received an injection at your office that day to see how they are doing.

– **Peter Mirabito DDS**, ADSPrecise.com

47. Have a competitive advantage or don't compete. If you don't have a competitive advantage—a reason for people to choose you over Practice B—you run the risk of being perceived as a commodity. And then every treatment plan you offer will be put under the microscope of price because there's nothing else for a prospective patient to hang their hat on.

– **Michael DiFrisco**, YourDentalMarketingSucks.com, [@howtobranding](https://www.instagram.com/howtobranding)

48. Create your own wellness plan and a saving over 35% overall major PPO plans.

– **Roz Fulmer**, RozFulmer.com

49. Be the leader in your practice and have a clear statement of what your vision is for your practice, something that your team can articulate, embrace and own. Then walk your talk!

– **V. Kim Kutsch**, KAndRSmiles.com, [@kimkutsch](https://www.instagram.com/kimkutsch)

50. Share your expectations with your team, in detail, and prioritize. One of the most common complaints I hear from team members is that they do not know what the doctor wants. They are anxious to please the doctor, but they feel they are just winging it most of the time. This can lead to frustration for the entire team and can have a negative impact on the overall production of the practice.

A while back one of my clients was very frustrated that his dental assistant was never in the treatment room when he was ready to deliver anesthetic. I asked him how he let her know that he expected her in the room during that procedure, and he said, "I press on the rheostat and when she hears it, she usually comes running." As you might guess this led to a lot of frustration for the doctor and the assistant. Also, it's important that you PRIORITIZE your expectations.

Using the example above, the doctor said the assistant was very detail oriented and could trim models to perfection, which is usually what she was engaged in when he needed her most. Once he made it clear that it was important to him that she be in the treatment room when he was ready to deliver anesthetic AND that it took priority over trimming models, it was never an issue again. I always tell my clients, "As long as your expectations are moral, legal and ethical, your team will give you 100% effort."

– **Judy Risner**, JudyRisner.com, [@judy_risner](https://www.instagram.com/judy_risner)

51. Embezzlement is always done by an employee who you have decided to trust. Remember that trust is a fluid concept and needs to periodically be reevaluated.

– **David Harris**, Prosperident.com, [@fraudguru](https://www.instagram.com/fraudguru)

52. Learn how to communicate with patients for them to accept your recommendations

– **Tarun Agarwal**, 3D-Dentists.com, [@tbonespeaks](https://twitter.com/tbonespeaks)

53. Start with your team. Hire based on well-developed core values. Do not hire anyone who does not possess or aspire to possess your values. Be convicted to fire someone who repeatedly violates a core value. Be prepared to incur a significant financial liability to protect those values.

– **David Phelps, D.D.S.**, FreedomFounders.com

54. Choose to measure and track specific metrics that are critical to your practice, using goals and plans as the path toward your mission of improving the health of every patient.

– **Weston Lunsford**, DentalIntel.com, [@Dental_Intel](https://twitter.com/Dental_Intel)

55. You can't expect amazing results without a concrete vision. Realistic, honest, and transparent data (as in leads, profit margins, and other key performance indicators) must be the backbone of your decision-making process, your future goals and the foundation for articulating your vision.

– **Dr. Boulden**, BulletproofDentalPractice.com/

56. The most common thing I find that holds Doctors back from hitting their full potential is a simple fact they are pursuing solving the wrong problem. Meaning, they are treating the wrong symptom. This is no different than the challenge you face in your practice when trying to solve a sensitive tooth. Is this decay, sinus issue, bite issue, or countless other choices. A proper diagnosis is the key to success, otherwise, you solve the wrong problems and then wonder why you get lackluster results!

– **Darren Kaberna**, AccelerateMyPractice.com

57. 1. Read and understand every PPO or Medicaid contract the dentist signs.

2. Bill for what you do, not what insurance pays for. Learn the codes that are most frequently flagged for by insurance and Medicaid. Armed with this information you can increase your income and protect yourself if audited.

58. Develop a strategy for self-auditing your records and understand that the responsibility for recordkeeping belongs to the doctor.

– **Dr. Paul Bornstein**, PaulBornsteinDMD.weebly.com/