



# BUSINESS OPERATIONS RESEARCH EVENT

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## EXECUTIVE SUMMARY

**Description of Business:** Eastview Family Dental was founded by Dr. Eugene Kato in 1988 as a sole proprietorship that has since transitioned into a partnership. Over time, the practice has grown through word of mouth to include a substantial customer base. Located in the Bellevue area, Eastview Family Dental has a wealth of experience in providing expert dental care.

**Problem:** Both customers and employees have noted shortcomings in Eastview Family Dental's external and internal relations. In addition, they face pressure to improve Corporate Social Responsibility. These problems can be summarized in Figure 1.1.



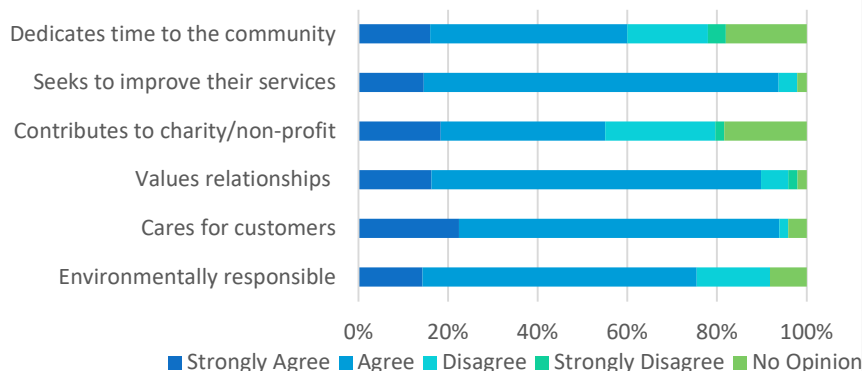
**Research Methods:** To determine the opinions of Eastview Family Dental's current Corporate Social Responsibility efforts, four different methods were employed and distributed to the different stakeholders. This provided a diverse and multifaceted view of the business. Three of these sources were primary, and all four are identified in Figure 1.2.

Patient Survey	Employee Survey	Co-Owner Interview	Secondary Research
<ul style="list-style-type: none"><li>• 196 total participants</li><li>• Available to patients in office and online for one month</li></ul>	<ul style="list-style-type: none"><li>• Survey distributed to all seven employees</li><li>• Distributed in one day</li></ul>	<ul style="list-style-type: none"><li>• Phone interview</li><li>• Took place on 11/10/18</li></ul>	<ul style="list-style-type: none"><li>• Various online resources</li><li>• Took place between 10/20/18 and 11/20 18</li></ul>

1.2

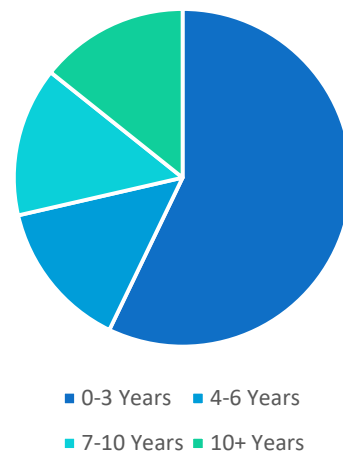
**Findings of Research Study:** The research methods yielded a wealth of information about Eastview Family Dental and its community. Figures 1.3 and 1.4 show some sample visualizations of the findings. The Likert Scale was used in both the patient and employee surveys to provide concrete numbers about the opinions of both parties. Figure 1.3 shows the responses of both employees and customers that indicate Eastview Family Dental's communication issues.

**Patient Perspective of Business's CSR**



1.3

**Years Working for Eastview**



1.4

**Research Conclusions and Objectives:** Once all research steps had been completed, the findings were synthesized and used to create the Eastview Family Dental Community Outreach plan. The plan is described in Figure 1.5 and will take place over a period of six months.

### Conclusions

Eastview Family Dental is lacking in both external and internal communication  
Employees of Eastview Family Dental are willing to participate in events but are not given the opportunity  
Employees of Eastview Family Dental receive no incentives to volunteer or similar

### Objectives

improve communication within office via bulletin board  
Provide employees with two paid volunteering days  
Purchase new software to communicate with patients  
Grow patient base with Google Ad Words  
Survey parties again at conclusion of plan

1.5

**Proposed Strategic Plan:** The Eastview Family Dental Community Outreach Plan will enable Eastview Family Dental to reach their community in new and exciting ways. In particular, all parties highlighted a lack of communication from Eastview Family Dental. In turn, the Eastview Family Dental Community Outreach Plan is a varied plan with activities that are primarily aimed at improving communication. These activities will begin in September 2019 and are outlined in Figure 1.6.

### Internal Communication

- Create internal bulletin board
- Communicate volunteering opportunities to employees
- Communicate new incentives to volunteer in community

1.6

### External Communication

- Establish connections on social media platforms
- Customer newsletter
- Leverage cheap software to communicate with patients
- Grow patient base with online advertising
- Attend local events

### Internal Relationships

- Provide employees with two paid volunteering days in a 6 month period
- Encourage employees to volunteer with others on paid volunteering days
- Host internal events during the holiday period to provide medium to build relationships

**Recommended Activities:** Due to Eastview Family Dental's small business status, the proposed activities aim to provide long-term value for both the business and consumer at a low cost. For this reason, larger expenditures such as paid volunteering days are being minimized. However, future stages of the plan could allow for additional volunteering days or additional scaling of other activities. Through the use of all activities in Figure 1.7, Eastview Family Dental will improve internal relations, as well as gain methods of responding to customers directly and reaching them in new ways.

1.7

Activity	Frequency	Quantity	Cost
Creating social media accounts	Once	N/A	\$0
Acquiring intern to run technology based communication	Once	N/A	\$400
Purchase Bulletin Board Supplies	Once	N/A	\$45
Finance Employee Paid Time Off	Every 3 Months	8	\$1200
Purchase third party dental reminder software	Once	N/A	\$525
Post Updated Volunteering Opportunities	Monthly	N/A	\$10
Hold Team Building Exercises	Monthly	N/A	\$40
Purchase Google AdWords	Monthly	N/A	\$150
Maintain newsletter	Ongoing	N/A	\$20
Maintain social media	Ongoing	N/A	\$0
Appear at future community events	Annually	N/A	\$400
Hold Internal Parties	Annually	4	\$800
Upfront Cost			\$970
Monthly Cost			\$200
Additional Cost every 3 Months			\$1200
Additional Annual Costs			\$1200
Total Costs for First 6 Months			\$5170
Total Costs for First Year			\$9370

**Key Metrics:** The Eastview Family Dental Community Outreach Plan will also make use of various metrics in order to measure its success. This will enable Eastside Family Dental to shift resources towards activities showing more engagement or effectiveness and to continue that growth into future years. The proposed metrics for the various activities are shown in Figure 1.8

1.8

Eastside Family Dental Key Metrics			
Metric	Analysis Method	Purpose	Goal
Advertisement Success	Google AdWords Analysis	Determine Effectiveness of Ads online	Ads lead to 15% or more growth in customer base
Customer CSR Perception	Customer Survey	Gauge usefulness of communication methods	Customers have 80% or more positive perception of CSR
Employee CSR Perception	Employee Survey	Gauge usefulness of communication methods	Employees have 80% or more positive perception of CSR
Employee Engagement	Employee Survey	Measure improvements in Employee Engagement	90% or more of employees report engagement

## II. INTRODUCTION

### A. Description of the business or organization

Eastview Family Dental was founded by Dr. Eugene Kato in 1988 and remained a sole proprietorship for almost 25 years. He had three full-time employees and one part-time before the sale of the business in 2012 to Dr. Brian Fong, when it was rebranded to Eastview Family Dental and moved to their current Bellevue address. After the sale of the business, Dr. Fong took over ownership and operations, expanding to a total of seven full time employees, and Dr. Kato became a partner in the business.

**Eastview Family Dental's mission is to provide the best dental care to meet a patient's individual needs.** They believe in patient education and facilitating informed decisions about patients' oral health. They provide local, small scale dentistry. Eastview Family Dental operates out of only one location in suburban Bellevue. The business transitioned into a partnership with the addition of Dr. Brian Fong to the staff. Eastview Family Dental targets families, friends, and nearby commuter workers who find the office location convenient. They seek to grow and acquire new patients by word of mouth and referral.

When it was founded, Eastview Family Dental was a sole proprietorship owned by Dr. Kato. In 2012, it was sold to Dr. Fong and became a partnership between the two.

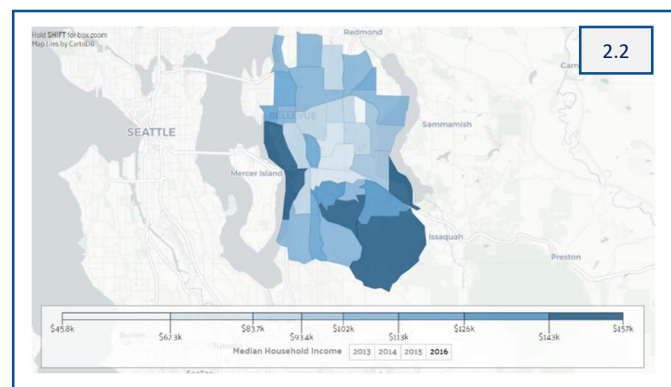
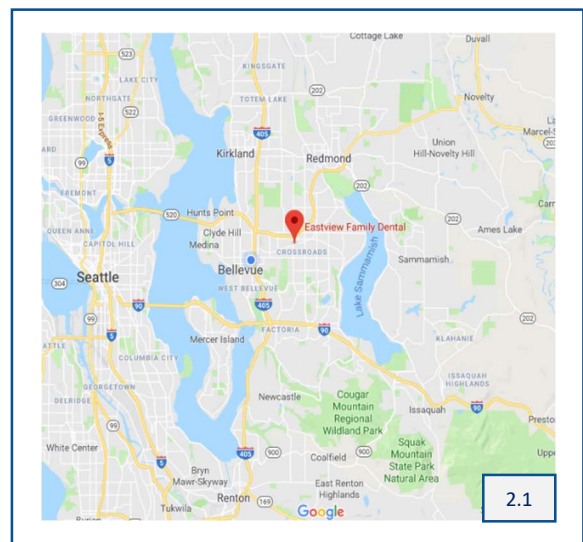
### B. Description of the community

#### Geographic:

Eastview Family dental is in the Pacific Northwest, specifically Bellevue, Washington on the shores of the Puget Sound. Their office is located 12 miles from Seattle (Figure 2.1). Located in Bellevue, Eastview Family Dental brings in customers from the entire greater Seattle area, including as far south as Renton. Eastview Family Dental faces heavy competition from neighboring dental offices less than a mile away from their office, including Bella Dental Care, Bellevue Smiles, and Brookside Dental.

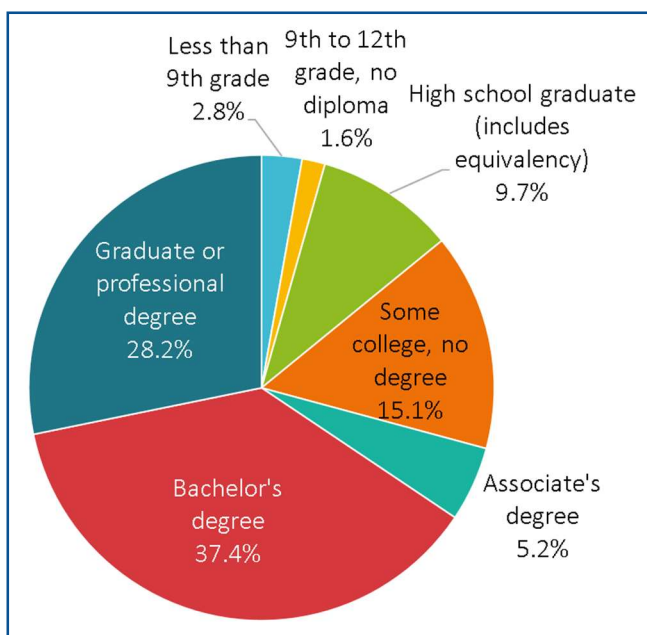
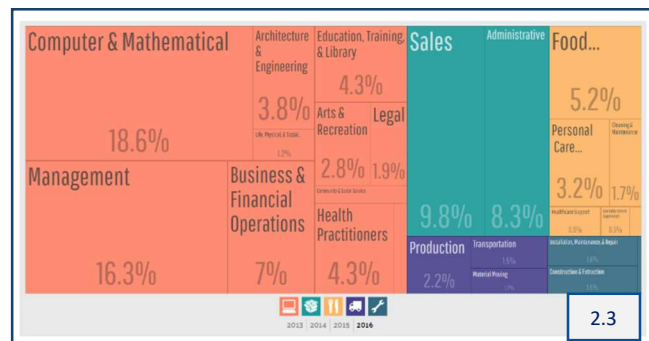
#### Demographic:

In the areas around Eastside Family Dental, Bellevue includes 104 Dentists per 100,000 people in the population and employs about 10% of the workforce in Healthcare-related professions (Figure 2.2). An additional 25% of the workforce is employed in areas of Professional and Scientific technology services, which includes some of the most common jobs in the area such as computer and mathematical positions (Figure 2.3). The average Bellevue citizen is 38.1 years old, and healthcare coverage is most common in males and females aged 25-34.



### Economic:

Bellevue, much like Seattle, revolves around international business titans such as Microsoft and Amazon. They employ many of the area's workers, and are contributors to low unemployment and high prices. The entirety of the Seattle area has an unemployment rate of 4.8%, while Bellevue has only a 3% unemployment rate. However, Bellevue still has a much higher cost of living than other parts of the country. The median home price is \$950,000 while the national median is only \$220,000.



### Socio-economic:

Many people in the Bellevue area have high household incomes, averaging \$100,000 compared to \$83,000 in the greater Seattle area. This indicates that the customers in this area have strong buying power. Bellevue is one of the more affluent portions of the greater Seattle area and customers are willing to spend money on basic oral health. Bellevue also has an extremely well educated population. In 2015, approximately two-thirds of Bellevue's population over 25 held a bachelor's degree or higher and less than 5% had less than a high school education. In the same year, 67% of Bellevue's population over 16 were in the workforce, and the unemployment rate was about 2%. Over 60% of the employed population is in science, management, or business, and

about 30% of Bellevue citizens earn more than 100,000 dollars a year. Finally, the area's household incomes vary from less to \$25,000 to over \$200,000, but no group is over or underrepresented.

### C. Overview of the business or organization's current corporate social responsibility

During its existence, Eastview Family Dental has made donations and volunteered with local programs as well as complied with government environmental regulation. For example, they comply with regulations for the disposal of mercury using a mercury separator and sharps and biohazard disposal to protect against cross contamination for the safety of patients and employees. In terms of labor practices, Eastview Family Dental provides above average pay for small businesses and negotiable benefits such as sick leave, medical, vacation time, and retirement. Eastview Family Dental has also donated to the University of Washington, student school and athletic programs, Kiera Nursing Home, and local churches. Dr. Kato has also personally volunteered 40 hours a year at the Dental School and Kiera Nursing Home outside of the business.



### III. RESEARCH METHODS USED IN THE STUDY

#### A. Description and rationale of research methodologies selected to conduct the research study

##### **Eastview Family Dental Surveys and Interviews:**

In order to provide the best perspective as to the current social responsibility of the company, the input from many different points of view was crucial. Two surveys directed at the customers and the employees of Eastview Family Dental in addition to a management interview were used in order to achieve this. The targets of these surveys were indubitably the most relevant in reference to corporate social responsibility. By surveying these two important groups of people, they are able to provide their own personal opinions and experience. A third management perspective was gained from an interview with Eastview Family Dental partner Eugene Kato.

##### **Customer Survey:**

Surveying the customers provided quantitative insight into the community perspective on the social responsibility of Eastview Family Dental. The data collected is credible because the community is one of the biggest groups who want to see improvement in the company's social responsibility. As a result, the data collected will shed light on the areas that Eastview Family Dental needs to improve or focus on the most especially when the customers were asked questions that allowed them to provide direct input.

##### **Employee Survey:**

As well as asking survey questions to customers, a survey was constructed and targeted at the employees of Eastview Family Dental. Another crucial facet of corporate social responsibility is the employee portion. This includes the company's attitude towards the employees, how well they are trained or how they treat their customers. Similar to the customer input, the data from the input of the employees is also extremely important. If the company isn't socially responsible to the employees, then this poses a problem that needs to be fixed immediately. The employees of a company are objectively the most important and by surveying their personal opinions based on their experience working for the company valuable data can be acquired and used.

##### **Management Interview:**

To gain an overarching view of the business, an interview was conducted with the former owner and current employee of Eastview Family Dental, Dr. Kato. The final facet of Corporate Social Responsibility is the owner's control over the activities of the business. This information is critical to the formation of the plan as the owner is directly involved in controlling as well as carrying out Corporate Social Responsibility actions. It also provides a second view of the company's current actions that can be contrasted with the employee point of view to lend credibility on both sides. Both the employees and owner must work together to create a shared vision and direction. Similarities or differences between the owner and employee points of view will shed light on possible differences within the company.

##### **Secondary Research:**

Finally, researching information from secondary resources provides the information needed to form a Corporate Social Responsibility plan. This provides the concrete steps needed to both form and execute a plan in a reasonable timeframe. It also provides additional options for Eastview Family Dental management to explore when it comes to improving their Corporate Social Responsibility. Finally, the secondary research provides an idea of what the industry surrounding Eastside Family Dental is doing in regards to their Corporate Social Responsibility.



## **B. Process used to conduct the selected research methods**

### **Eastview Family Dental Patient Survey:**

Patient surveys were distributed in person and on the Eastview Family Dental website over a period of October 13<sup>th</sup> to November 13<sup>th</sup>, 2018, providing enough time for several Eastview Family Dental patients to be exposed online and in the office. The survey was provided via Google Form online and a stand was placed in the office advertising the survey with a link to the Google Form. The survey was also distributed in the form of some paper copies, and had a total of 12 questions. The survey was approved by both the chapter advisor and Dr. Kato. The Google Form was an effective way to reach Eastview Family Dental's patients as many of them use their cell phones in the office to schedule their next appointment, providing a method for them to take the survey. 196 Eastview Family Dental patrons answered the survey in this time period, which is a high figure that is relatively close to the average number of patients per month. Forty patients participated in person and 156 answered online. Thanks to having a high number of answers, it ensured that an accurate picture was constructed of patient wants and perceptions of Eastview Family Dental.

### **Management Interview:**

On November 10<sup>th</sup>, 2018, a phone interview was scheduled and conducted with Dr. Kato. Due to his busy schedule, it was decided to conduct a phone interview at a time opportune for him. The interview lasted 29 minutes and included twenty questions covering topics from the business history to the business CSR contributions. Dr. Kato was selected over Dr. Fong for his insight into the business's history before the sale to Dr. Fong and because he has much more experience with both the patients and practice of Eastview Family Dental. In addition, he is a senior member of the practice and only slightly below Dr. Fong in the business's hierarchy. His experience with the business provides a credible viewpoint that was essential to forming a Corporate Social Responsibility plan.

### **Employee Surveys:**

In order to obtain more information about the inner workings of Eastview Family Dental, the practice's employees were surveyed. These employee surveys were distributed in person on November 6<sup>th</sup>, 2018 and seven employees answered the survey. This survey was conducted as an additional source of information gained in the interview. In addition, the survey added a level of credibility to Dr. Kato's interview and provided a look at how his practices are perceived from the other side of the relationship. Surveying employees also provided the most complete picture of how Eastview Family Dental employees interact with customers. Their experience with direct customer interaction complements the picture of the business created by our phone interview, and their work experience provides additional information for the formation of a Corporate Social Responsibility plan.

### **Secondary Research:**

To gather additional research about the effects and uses of Corporate Social Responsibility, two articles were investigated. These articles were read and analyzed between November 10<sup>th</sup>, 2018 and November 13<sup>th</sup>, 2018. They were researched in order to fully understand Eastview Family Dental's available actions in order to improve their Corporate Social Responsibility. They also provided valuable information about the steps of execution necessary to include in a Corporate Social Responsibility plan.

## **IV. FINDINGS AND CONCLUSIONS OF THE STUDY**



### **A. Findings of the research study**

The research study conducted in this investigation consisted of an interview with the founder and former owner of Eastview Family Dental, a survey of Eastview Family Dental's employees, a survey of

Eastview Family Dental's patients, and secondary research. Each facet of the study provided data identifying Eastview Family Dental's strengths, weaknesses, and potential improvements.

#### Management Interview:

After questioning management about a wide range of important points, a few problems began to rise to the surface. **Through several questions, it became clear that there were issues between management and employees.** Dr. Kato stated that many of the recent employees "have not stayed for very long". Additionally, with a recent change of management, new ideals were brought along too and for some employees the change was abrupt as a result of "a really big and constant turnover". **There were also problems in the communication lines with the customers and interactions with the community.** The company was missing many important facets of communication such as an online presence and forms of advertising other than word of mouth. Presently, the business only communicates in person and over the phone. While these methods are direct, they are not always the most convenient for the customer. Another important factor of community interaction is the contributions that a business makes, and that was lacking for Eastview Family Dental. One of the primary problems being that many employees do not prefer to participate in the events that Eastview does contribute to. Lastly, being a small business they cannot afford to offer incentives to undertake volunteer work.

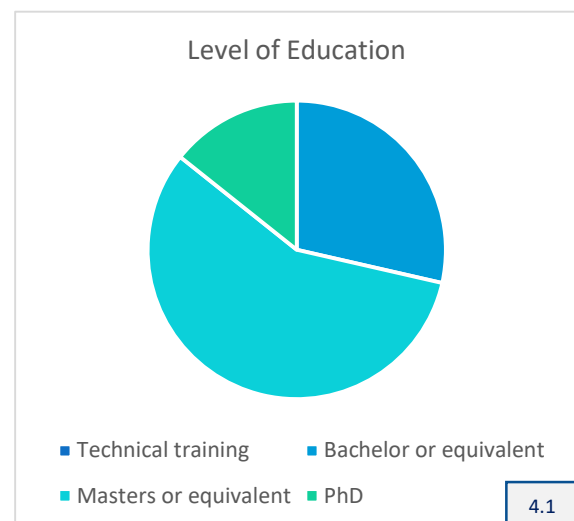
#### Secondary Research:

Many companies have had success in improving their CSR not by focusing on one specific portion of CSR or supporting one organization but instead broadening their efforts in order to influence a larger portion of the social sphere and reach more people. Being too specific can narrow the intended scope of effect. Additionally, after conducting CSR efforts it is crucial to spread the word. In the new age of technology this can be made much easier through communication lines such as social media. In conjunctions with direct customer surveys, we can start to formulate tactics to inform possible new consumers as to Eastview Family Dental's CSR. This can be beneficial for a number of reasons, specifically improving the branding of the company. Since Eastview Family Dental is a small company, branding and community perspective is crucial in reference to attracting new customers and retaining current ones.

CSR is a crucial component of every business. According to a 2015 study by the Kenexa High Performance Institute in London, organizations that were committed to a well thought out CSR plan saw an average return on assets 19 times higher than others. The International Institute for Sustainable Development (IISD) describes the six components to establish an effective CSR plan (1) CSR Assessment (2) CSR Strategy (3) CSR Commitments (4) Implementation Plan and Actions (5) Verification and Evaluation of Results and (6) Refinement. A key detail however is the desire of management and of the entire staff to carry out the CSR plan. Without strong intent a CSR plan will easily fall short of the intended results. In order to best implement a plan, everyone must be on board and motivated. In tandem with this, once the plan begins to be enacted and if all assets are committed to the success of the plan, then this is where the results begin to show and the return on assets increases dramatically.

#### Employee Survey:

**Findings** - When looking at a business, it is important to consider the makeup of its employees. The data received in the survey indicates that while all Eastview Family Dental employees are sufficiently educated, there is a noticeable disparity in the gender ratio, with 86% of the employees being female. As a result, the survey reflects the opinions of mainly female individuals.

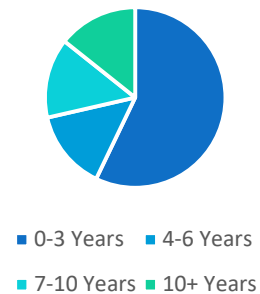


**Findings** - Given the recent change in Eastview Family Dental ownership, it is also important to look at the length of employment for employees. Many of the employees have been with the business for 0-3 years, with the remainder of the employees split into the other brackets. The fact that most employees are relatively new to the business indicates an opportunity to build long lasting relationships with those employees. However, care must be taken not to alienate longer term employees.

**Findings** - In looking to explore CSR at the business, it is necessary to obtain a picture of current employee perceptions of CSR. At Eastview Family Dental, only 57% of employees stated they were very familiar with CSR. By educating those who are unsure or do not know about Corporate Social Responsibility, Eastview Family Dental can again focus on improving their employee knowledge and relationships.

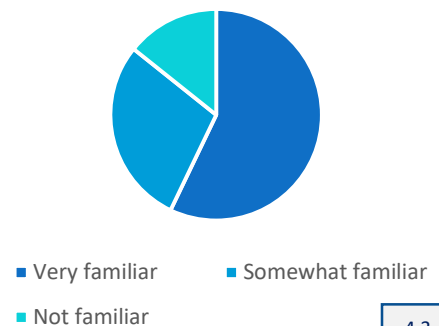
**Findings** - Examining employee perceptions of CSR in addition to knowledge is another important part of a business's operations. 100% of employees would have an improved opinion of Eastview Family Dental if CSR activities were conducted locally. In addition, all employees are willing to dedicate time to employer-sponsored community service. This presents a clear opportunity for Eastview Family Dental to improve employee relations by sponsoring employee service or carrying out other CSR activities.

Years Working for Eastview



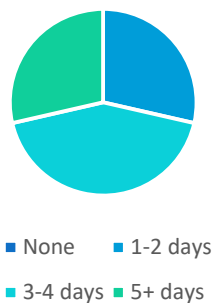
4.2

Familiarity with CSR



4.3

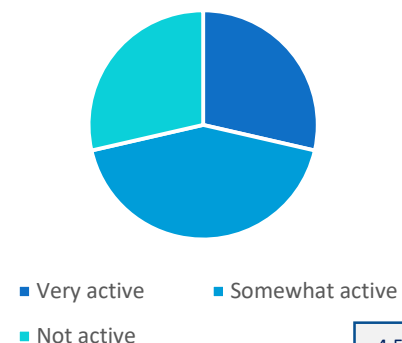
Time Willing to Spend Participating in Sponsored Events



4.4

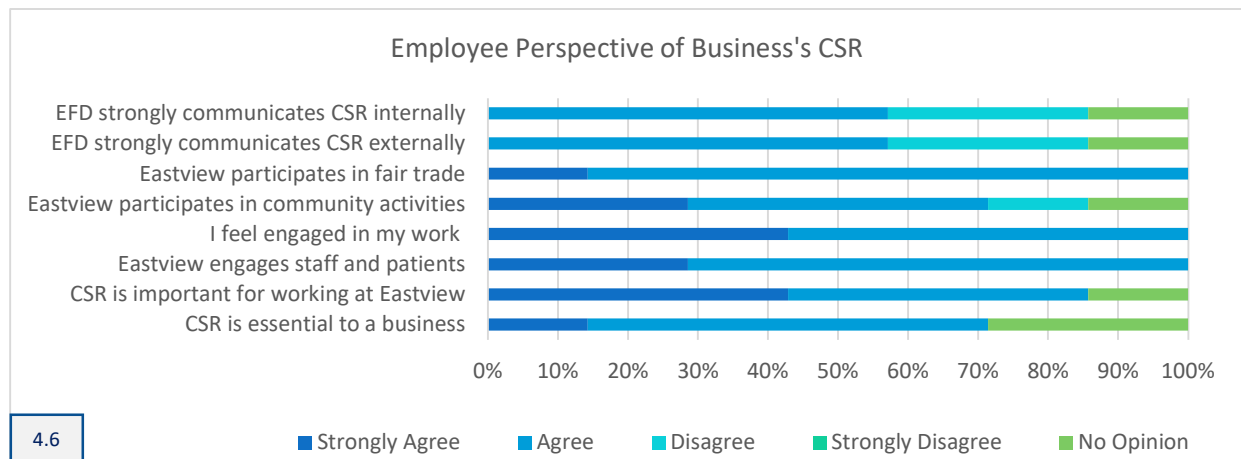
**Findings** - In order to obtain an accurate picture of the willingness of employees to contribute to the community, the business must find out the current activity of its employees. 71.5% of employees indicated they are "Somewhat Active" or "Not Active", while only 28.6% stated they were "Very Active". This indicates that despite high willingness to participate in socially responsible initiatives, employees may lack appropriate methods of participation that Eastview Family Dental may be able to provide.

Degree of Employee Activity in Community



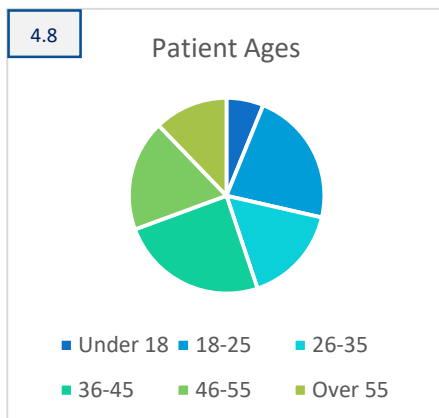
4.5

**Findings** - As a final part of the employee survey, a Likert scale was employed to discover employee opinions on a variety of socially responsible topics. Employees reported they feel engaged at Eastview Family Dental, but voiced disagreement when asked if CSR efforts were strongly communicated or if Eastview Family Dental participated in the community.



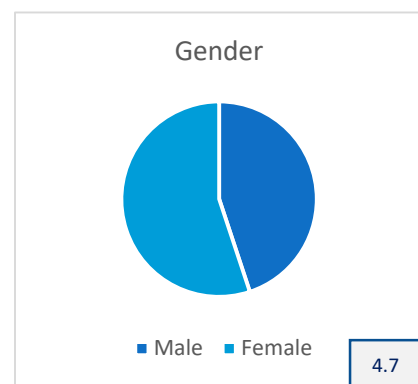
### Customer Survey:

**Findings** - Further analysis of demographic surveys gives a general overview of the customers of Eastview Family Dental. Overall the numbers aren't staggered towards any specific demographics. There is no major inequality between the ages, (besides ages under 18, which is to be expected) nor is there a major gap between the genders. Considering the fact that all ages are relatively balanced, it is clear that Eastview Family Dental has done a good job building customer relationships with all types of people.

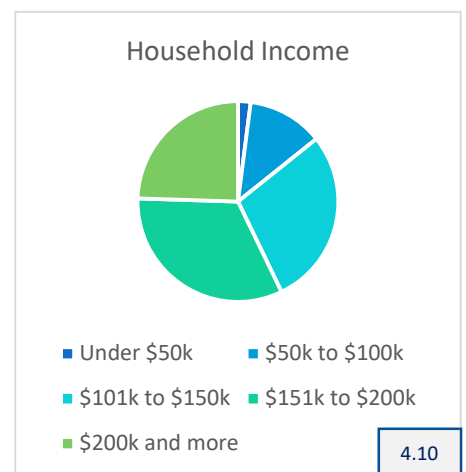
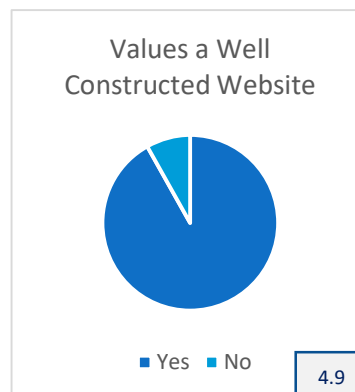


### Findings -

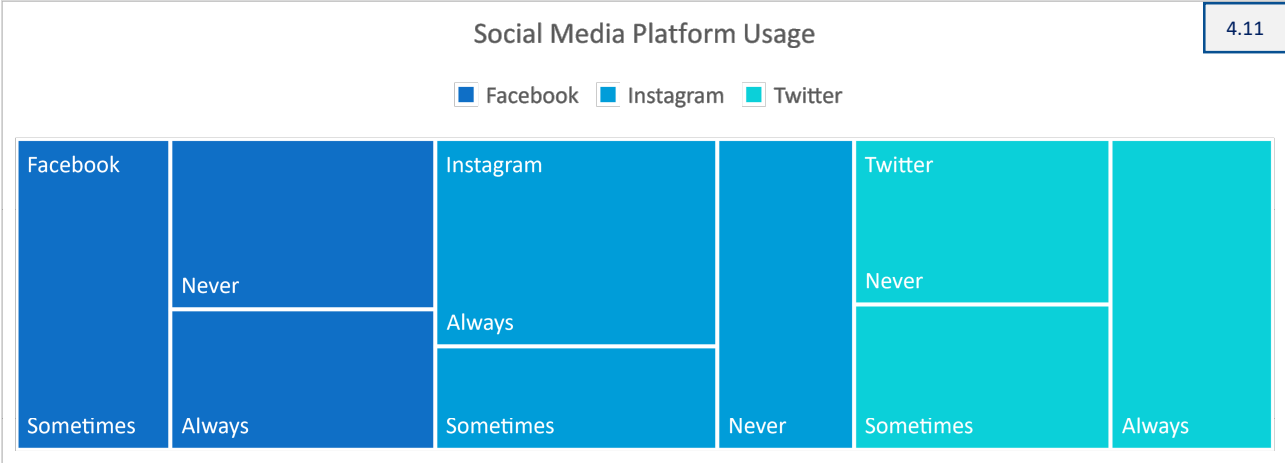
Analyzing the income level of the customers gives insight into the financial background of the patients. Looking at figure 4.8, most of the customers at Eastview Family Dental come from high income level households. With only 14% making less than \$100,000 in a year, Eastview Family Dental caters to the wealthy. This may be a problem as the working-class families cannot afford to pay for the dental care provided. It may be advantageous to accept additional insurance providers.



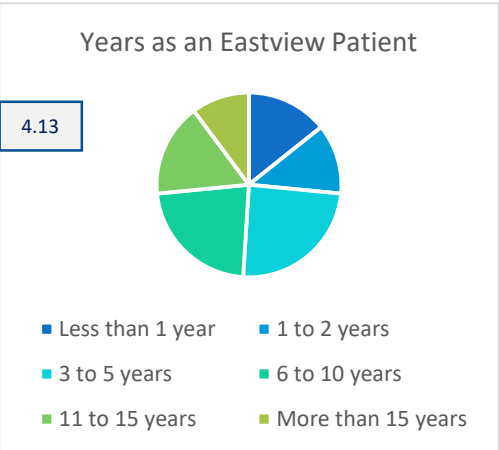
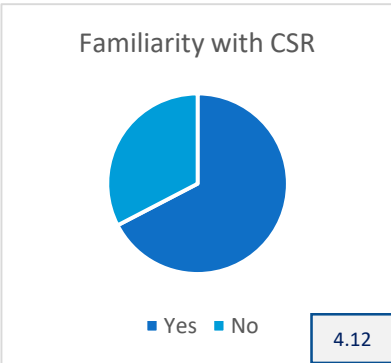
**Findings** - In order to construct an effective CSR plan, it is important to know what the customer values and will possibly use. The results of this question shown in Figure 4.9 indicate that a website would be very effective, since 91.8% of customers said that they value a well-constructed website.



**Findings** - Similar to data on a website, surveying the customers for their usage of popular social media outlets is necessary to determine what will be useful in the CSR plan. Referring to figure 4.11, Instagram would yield the best results in terms of promoting different aspects of Eastview Dental’s CSR such as informing customers of charitable events or activities they have participated in. Second is Twitter as 38.8% of the customers use this outlet and third is Facebook at 28.6%.

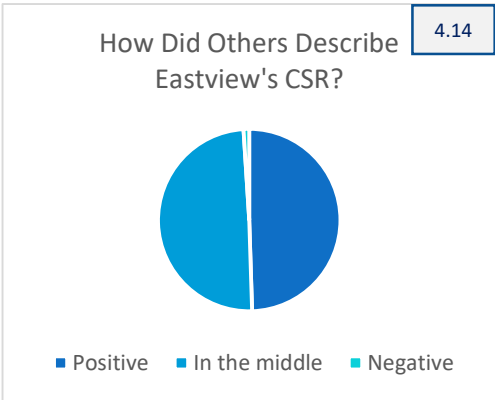


**Findings** - The question of CSR familiarity was necessary to understand where the business’s customers stood in terms of knowledge of the term CSR. Referring to figure 4.12, most customers have knowledge of the term. In conjunction with this data, 79.6% of patients at Eastview valued CSR in their dental practice. The data provides justification for creating, implementing and expanding a CSR plan.

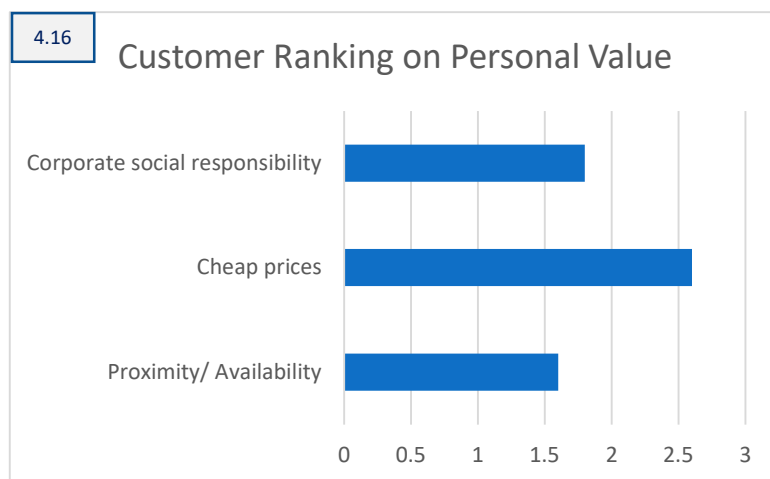
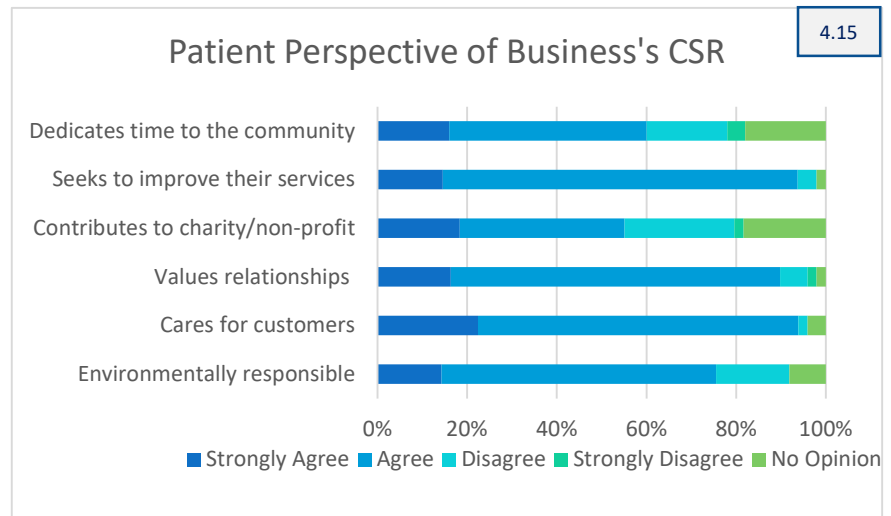


**Findings** - The customer perspective on CSR is very important, especially because currently most advertisement is done through word of mouth. If the word being spread isn’t positive, then it must be changed. The CSR plan must ensure that more customers describe the CSR as positive.

**Findings** - The results of this question are crucial in determining whether the relationships built by the staff and management are successful in retaining clientele. The chart reveals that currently half of the patients have only been customers at Eastview Family Dental for less than five years. Moving forward, it is very important to continue building relationships in order to retain those customers over time.



**Findings** - By looking at the results of this survey question, it can be determined that every category needs work. Currently only a small portion of the customer base “Strongly Agrees” with these key factors of CSR. Moving forward, the plan must create results that change this outlook on the company in general. Additionally, the graphic shows which areas need the most work, namely making charitable donations and dedicating time to the community.



#### Findings:

Figure 4.16 shows that although customers value CSR, it is still being trumped by their belief that cheap prices are the best. Part of the CSR plan should address this problem. This is especially important in dental work when quality is everything.

## B. Conclusions based on the findings

After conducting the patient survey, interviewing the former owner, surveying employees, and completing secondary research, several conclusions were drawn based on the findings. In order to apply the findings, the information found in the secondary research will be used in the formation of the plan.

### High Employee Willingness to Participate in CSR:

While Eastview Family Dental has relatively few employees, they are clearly enthusiastic towards the idea of community participation. All employees stated CSR activities would improve their opinion of the employer and they would be willing to devote time to the community if sponsored by Eastview Family Dental. However, Eastview Family Dental is currently not taking advantage of this potential. Adding employees into volunteering events at Kiera Nursing Home, the Dental School, or other trustworthy organizations would use this enthusiasm to the business's advantage.

### Relative Lack of Established Business-Employee Relationships:

The majority of Eastview Family Dental's employees have not been with the business for long. Due to turbulence following the sale, several long-term employees have been let go in favor of new faces. However, some established employees remain, and it is important for Eastview Family Dental to bridge these divides between new and old employees. One way to reach out to employees could be workplace

social events, such as occasional dinners. While they can be costly, a work dinner could be a valuable social experience that does not need to be paid for often.

### **Insufficient Amount of Employer-Sponsored Events and Communication:**

According to the interview with Dr. Kato, Eastview Family Dental participates in volunteering events, but does not involve the employees. Employees also voiced their disagreement when asked if CSR efforts were communicated strongly internally. While opportunities are present, employees are seemingly not being notified about volunteer events or allowed to participate. By adding employees into existing events sponsored by Eastview Family Dental or beginning new events that allow employees to have an active role in the volunteering project, Eastview Family Dental can address this problem in a way that is engaging to all employees.

### **Inadequate Company-Customer Communication:**

Judging by the customer survey data, many customers are not up to date on the company's actions. Although in figure 4.15 many people "agree" with the statements, this still reveals the problem. If Eastview Family Dental had effectively communicated their CSR actions, then "strongly agree" should have been the highest percentage result. From the interview, it was established most of Eastview Dental's advertising is done from word of mouth. This lack of communication between the company and customers shows itself in figures 4.14 and 4.15. In figure 4.14 the data reveals a large portion of the customers were told the company's CSR is in the middle, since word of mouth is the only form of communication, then this means the community perspective on the CSR of Eastview Family Dental is not entirely positive. For small businesses, maintaining a positive image is key when developing a company, thus this problem needs to be taken care of immediately for future success. Secondly, figure 4.16 depicts the blatant lack of priorities in the customer base of the company. Part of the communicating with dental patients is the value of quality above most else. However, the secondary research states that one of the best ways to improve communication is via social media. Eastview Family Dental needs to make sure that the customers understand that CSR is crucial if they want to receive quality care as it deals with maintaining and improving service.

## **V. PROPOSED STRATEGIC PLAN**



### **A. Objectives and rationale of the proposed strategic plan**

#### **Objective: Improve and Provide Employee Volunteering Incentives**

**Rationale:** After considering the research conducted, it became clear (removed that here) while Eastview Family Dental employees were willing to participate in sponsored events and contribute time to volunteering organizations, Eastview Family Dental was not providing those opportunities. 100% of Eastview Family Dental employees answered that they were willing to contribute time to sponsored events, and over 60% of employees stated they would contribute three or more days to volunteering. The patient survey also showed 25% of Eastview Family Dental customers disagreed when asked if Eastview Family Dental dedicated time to the community. If Eastview Family Dental was open and encouraging towards employee volunteering, they could utilize the enthusiasm of their employees to improve their image in the community. In addition, this would help improve employee engagement as 100% of employees stated CSR activities would improve their opinion of Eastview Family Dental.

#### **Objective: Develop Internal Communication and Morale within the Workplace**

**Rationale:** The employee survey also revealed a lack of internal communication and possible divides within the employee base. 57% of Eastview Family Dental employees have worked at the business for less than three years, while the remainder of employees have been employed for, on average, much longer.



In addition, 25% of employees disagreed when asked if Eastview Family Dental had strong internal communication in regards to CSR efforts. While these factors are issues within the business, the employee survey also revealed a potential opportunity to improve the atmosphere and build teamwork between employees. 100% of employees stated they would have an improved opinion of Eastview Family Dental if CSR activities were conducted. This provides an opportunity for team building CSR activities and an opportunity to practice strong internal CSR communication. If Eastview Family Dental can take advantage of this chance, they will cement bonds between their employees and contribute to higher workplace morale.

**Objective: Strengthen Communication with the Customer and Community**

**Rationale:** The customer survey and interview results of the research made it obvious that there was a present lack of communication lines between the company and the customer or potential customers. First, in the interview, the management of the company stated that most advertisement was done through word of mouth. This poses a problem because potential new customers are not being made aware of the services provided, additionally, only 49.5% of customers answer that the word of mouth was positive in reference to company image. If communication were strengthened, Eastview Family Dental would see an increase in new customers. In reference to CSR, the survey results showed many customers of Eastview Family Dental were not made completely aware of the activities that company was participating in. Any CSR efforts made will not have the fully intended effect if the public is not made aware of them. By clearly communicating the CSR activities to the community and current customer base, the services provided will be more appealing and the overall company image will improve.

After identifying these objectives, the **Eastview Family Dental Community Outreach Plan** was created in order to complete these goals.

**B. Proposed activities and timelines**

**Offer Employees Paid Volunteering Time:**

By providing two days of paid volunteering time to Eastview Family Dental employees over a period of six months, Eastview Family Dental can take advantage of employee enthusiasm. In addition, this gives employees no reason not to try out volunteering for themselves, as a paid day off is a strong incentive. By additionally requiring one of the two days to be with another employee, Eastview Family Dental can also build camaraderie. If this is accomplished, employee morale and mood will increase as well as Eastview Family Dental's Corporate Social Responsibility. Furthermore, potential patients or current Eastview Family Dental patients can see the employees of Eastview Family Dental being active in the community.

**Contact Local Volunteering Associations:**

In order to assist employees in finding appropriate volunteering organizations, Eastview Family Dental will contact trusted local community centers, such as the YMCA, to establish relationships. Through these relationships, they can interface with the community as well as provide suggestions for their employees to volunteer with. If accomplished, the relationships with local organizations will be useful not just for volunteering but also for potential customers. Thanks to the visibility of Eastview Family Dental's efforts, new patients could hear about the business.

**Establish a Bulletin Board in the Office:**

The establishment of a Bulletin Board in the office will help to increase the workplace awareness of Eastview Family Dental employees. By placing this board in a high traffic area, such as the breakroom or the reception desk, employees will be able to stay up to date with Eastview Family Dental's activities both internally and externally. It will also include a calendar of upcoming volunteer opportunities. If accomplished, the bulletin board will be an effective way to

communicate changes and events to employees in a timely manner at relatively low cost and with minimal effort.

#### **Host Holiday Events:**

Hosting events for holidays and other milestones related to the business will aid in building relationships between Eastview Family Dental's varied employees. While they may differ in employment length, they can bond over common successes as part of the business or the social occasions provided by the holiday season. If accomplished, these social events will be valuable locations for Eastview Family Dental employees to socialize and build relationships with their coworkers.

#### **Establish and Strengthen Social Media Presence on Twitter and Instagram:**

Establishing and maintaining a social media presence is a cheap and easy way to greatly improve communication with the customers. This activity consists of three major components. First it will be necessary to create the accounts. Creating Instagram and Twitter accounts is free and requires very little effort. The second part is informing the customers of their existence. Signs in the office and informing the customers from reception are both cheap and easy ways to accomplish this. Finally maintaining consistent and effective posts are crucial to the success of this activity. Seeking advice from professional consultants would be worth the investment in order to maintain efficiency of the page effectively. The posts can be used for many things: reminding customers of services, informing of CSR events and highlighting workplace events, important employees etc.

#### **Create a Customer Newsletter:**

In order to provide a consistent flow of information from the office to the customer, an email newsletter that takes advantage of the widespread usage of mobile technology can be implemented. This newsletter can be sent out weekly, informing customers of workplace events, CSR undertakings and other significant contributions to the community. By creating a connection between the office and the customer, the newsletter serves to inform the customers and help them become invested in Eastview Family Dental. Commitment is important and through a newsletter to the customers, Eastview can stay better connected to the community.

#### **Acquire Third Party Software: PracticeMojo:**

A prominent problem in the dental industry is failing to communicate with the customers on a basic level about scheduling appointments or reminding them if they need to show up. By purchasing a cheap third party software, this can all be done easily without having to worry about extra labor. Using this third party software allows Eastview Family Dental to ensure consistent visits and automatically reach and remind 100% of the customer base. This is intended to make the customer feel valued.

#### **Advertise Through Google AdWords:**

To make up for the lack of advertisement directed at the community of Bellevue, Google AdWords is a cheap solution. If potential customers in need of dental care were to look up potential dental offices in the Bellevue area, Eastview Family Dental does not even show up. By paying an overall low price, the company can further extend their reach into the community, making their name known as customers search for new dental care.

#### **TIMELINE:**

These activities will be implemented and tested over the course of six months with the assistance of Dr. Kato and Dr. Fong. Due to the constant business of a dental practice, September was selected as the ideal time to begin the plan due to the opportunities for holiday events at the business. At the end of the final month, Eastview Family Dental will conduct another customer and employee survey in order to measure the success of the plan.

Month	Week	Activities
<b>Month 1: September</b>	Week 1	<ul style="list-style-type: none"> <li>• Research consultants for social media page</li> <li>• Scout talent to run social media and newsletter</li> <li>• Purchase and begin to use PracticeMojo</li> <li>• Purchase Bulletin Board and paper supplies</li> <li>• Meet with employees to introduce paid volunteering time</li> <li>• Research potential incentives for future employee volunteering</li> <li>• Research Team Building Exercises for the team</li> <li>• Purchase Google AdWords monthly</li> </ul>
	Week 2	<ul style="list-style-type: none"> <li>• Meet with social media consultant and begin to create pages</li> <li>• Pre-plan content for newsletter</li> <li>• Put up Bulletin Board in office</li> <li>• Contact local volunteering associations</li> </ul>
	Week 3	<ul style="list-style-type: none"> <li>• Begin to inform customers of social media pages</li> <li>• Begin to send out newsletter emails to interested customers</li> <li>• Introduce interested employees to volunteer organizations</li> </ul>
	Week 4	<ul style="list-style-type: none"> <li>• Begin work on next newsletter</li> <li>• Establish that one of the two volunteering days needs to be with another employee</li> <li>• Post volunteering opportunities on bulletin board</li> </ul>
<b>Month 2: October</b>	Weeks 5-8	<ul style="list-style-type: none"> <li>• Begin to roll out PracticeMojo system to patients</li> <li>• Inform employees of need to take at least one of two paid volunteering days by the end of Month 3</li> <li>• Improve newsletter based off of customer feedback</li> <li>• Improve social media pages based off of first data received</li> <li>• Encourage employees to take volunteering days</li> <li>• Post employee volunteering on bulletin board</li> <li>• Conduct first team building exercise</li> </ul>
<b>Month 3: November</b>	Weeks 9-12	<ul style="list-style-type: none"> <li>• Check in with employees after first paid volunteering day</li> <li>• Survey opinions about paid volunteering days</li> <li>• Encourage Employees to come to internal Thanksgiving party</li> </ul>
<b>Month 4: December</b>	Weeks 13-16	<ul style="list-style-type: none"> <li>• Remind employees about second volunteering day</li> <li>• Hold Holiday party for the office before winter closing</li> </ul>
<b>Month 5: January</b>	Weeks 17-20	<ul style="list-style-type: none"> <li>• Remind employees to complete second volunteering day by the end of February</li> <li>• Begin creating metric surveys</li> </ul>
<b>Month 6: February</b>	Weeks 21-24	<ul style="list-style-type: none"> <li>• Survey employees about volunteering days and office events</li> </ul>

		<ul style="list-style-type: none"> <li>Evaluate customer satisfaction with Newsletter, Social Media, and PracticeMojo</li> </ul>
<b>Post 6 Months:</b>		<ul style="list-style-type: none"> <li>Develop plan to appear at Bellevue community events in the future</li> <li>Hold Easter party and distribute gifts to customers</li> <li>Expand social media presence</li> </ul>
<b>Continuous</b>		<ul style="list-style-type: none"> <li>Continue to meet with social media consultant to monitor success of social media efforts</li> <li>Continue to send weekly newsletters via email</li> <li>Continue to purchase Google AdWords each month</li> <li>Continue to use PracticeMojo system</li> </ul>

### C. Proposed metrics or key performance indicators to measure plan effectiveness

In order to maximize the effectiveness of the plan, the activities that do not have as much success need to be eliminated to focus more energy and funds on the activities that are serving their purpose. The results of the activities can be measured many different ways, however most are specific to each individual activity.

#### Analyze Success of Technology Based Advertisement:

To determine which communication techniques are most effective activities must be monitored specifically. The success of social media outlets is simple. By tracking likes and views of each post it can be seen what the customers are interested in or if they like what Eastview Family Dental is doing. By posting about CSR events and monitoring the likes on the post, the effect on the community can be determined. Additionally, an open, but patrolled comments section not only allows feedback but enables direct response from the business. Google AdWords also gives easy to analyze insight into the success of the advertising. By viewing click trends and website traffic, it can be determined whether or not the people who are clicking on the purchased ads are actually following through and purchasing dental care. If the ads do not receive enough clicks, other advertising methods can be considered.

#### Customer Surveys:

Customer surveys are a cheap way to get feedback to determine if the communication lines being used are useful or not. The purpose for using third party communication software such as PracticeMojo is to improve the connections between the customer and the office. Customer surveys can target key points such as whether or not the customer enjoys using the app or whether or not they believe it is effective. Additionally, a customer survey would be an effective way to receive input on the weekly newsletters. If the customer gives positive feedback then Eastview Dental can continue to invest in an employee to run the app and/or newsletter, etc.

#### Employee Surveys:

Similar to Customer Surveys, employee surveys are low-cost options that can be used to check in with employee opinions on the new programs. The purpose of the paid volunteering days, business events, and team building exercises is to improve relationships within the office and take advantage of employee enthusiasm. If the survey reflects positive opinions on the new programs, Eastview Family Dental will be able to confidently move forward with its new volunteering and internal efforts.

## VI. PROPOSED BUDGET

The budget shown in figure 6.1 provides an idea of the total costs for one year of the Eastview Family Dental Community Outreach Plan. These costs will decrease in consecutive years as many activities need to only take place once.

6.1

Activity	Frequency	Quantity	Cost
Creating social media accounts	Once	N/A	\$0
Acquiring intern to run technology based communication	Once	N/A	\$400
Purchase Bulletin Board Supplies	Once	N/A	\$45
Finance Employee Paid Time Off	Every 3 Months	8	\$1200
Purchase third party dental reminder software	Once	N/A	\$525
Post Updated Volunteering Opportunities	Monthly	N/A	\$10
Hold Team Building Exercises	Monthly	N/A	\$40
Purchase Google AdWords	Monthly	N/A	\$150
Maintain newsletter	Ongoing	N/A	\$20
Maintain social media	Ongoing	N/A	\$0
Appear at future community events	Annually	N/A	\$400
Hold Internal Parties	Annually	4	\$800
Upfront Cost			\$970
Monthly Cost			\$200
Additional Cost every 3 Months			\$1200
Additional Annual Costs			\$1200
Total Costs for First 6 Months			\$5170
Total Costs for First Year			\$9370

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