

# Priorities & Risk Assessment

Doctor Completing Assessment

Date

## What are your greatest needs and priorities?

This list contains over 100 key areas where Joy's expertise might benefit you. Please simply place an X in the blocks  indicating your priorities, or where you may be at risk for not having a system or appropriate procedures in place.

### Internal and External Marketing

- Image and Design
- Environmental Sales Strategies
- Staff Individual Marketing Plans
- Telephone Skills
- Scripting Communication
- Review of Existing Systems, Letters and Forms
- Reception Room Dynamics
- Team Influence on Treatment Acceptance
- The New Patient's Initial Visit
- Treatment Acceptance Process - Engaging the Patient
- Marketing Specific Services
- Target Market Analysis
- Creating a Marketing Plan
- Positioning the Practice in the Community
- Marketing Materials

### New Patient Event and Treatment Acceptance

- Scheduling New Patients
- The New Patient Event
- Attitudes Regarding Treatment Acceptance
- Modeling What You Want To Do
- Scripting Effective Chairside Communication
- The Clinical Evaluation Process
- Documentation of Findings
- Comprehensive Treatment Planning - The Paperwork
- Consultation - Presenting Treatment Recommendations
- Monitoring Treatment Acceptance and Completion
- What to do When Patients Refuse Treatment

### Financial Arrangements and Insurance

- Presenting Fees and Financial Arrangements
- Skills for Time of Service Collection
- Review of Aged Accounts Receivable
- Collecting Delinquent Past Due Accounts
- Collecting Fees in Advance of Treatment
- Insurance Processing and Follow-up
- Eliminating Insurance Involvement

### Coordinating Care

- Planning the Sequence of Care
- Scheduling Effectively
- Insuring Essential Steps are Completed
- Coordinating Treatment with Other Professionals
- Preventing the Loss of Patients in Treatment
- Follow-up Systems for Incomplete Treatment
- Monitoring the Effectiveness of Providers
- Recall and Continuing Care
- Preventing Loss of Patients in Recall
- Job Description for Treatment Coordinators

### Patient Retention and Lost Patient Recovery

- Understanding Risk - When Patients are Lost
- Preventing the Loss of Patients in Treatment
- Preventing Loss of Patients in Recall
- Responding to Late Patients
- Responding to Broken Appointments and Cancellations
- Hygiene Department Involvement in Loss Prevention
- Procedures for Recovering Lost Patients
- Scripts for Calling Lost Patients
- Letters for Recovering Lost Patients
- Medical/Legal Documentation
- Monitoring Loss and Reporting Recovery Success

### The Business of Implant Dentistry

- Developing an Implant Practice
- Scripting Communication about Implant Dentistry
- Marketing the Service of Implant Dentistry
- Informed-Consent for Implant Dentistry
- Preoperative and Postoperative Instructions
- Coordinating Treatment with Other Dental Professionals
- Essential Business Skills for the Dental Implant Team

### Referral Development

- Targeting Referral Relationships
- Eliminating Referral Resistance
- Systems and Forms for Tracking Referrals
- Enhancing Referral Relationships

### Income and Expenses

- Evaluation of Previous Income
- Evaluation of Fees
- Establishing Realistic Goals
- Scheduling to Exceed Goals
- Accountability for Achieving Goals
- Evaluating Income and Expenses
- Establishing a Budget
- Strategy for Budget Management
- Inventory Control System
- Ordering and Receiving Supplies
- Management of Cash Disbursements
- Internal Controls and Theft Prevention

### Risk Management

- When Does Risk Occur?
- Staff Involvement In Risk Management
- Secrets Staff Should Not Keep from Doctors
- How the American Legal System Works
- Patient Records and Forms
- Patient Record Updates
- Consent for Treatment
- Risk - When Patients Don't Return
- The Doctor's Liability
- Appropriate Termination of Patients

### Team Leadership and Development

- Written Office Policies
- Job Descriptions
- Determining Staffing Needs
- The Characteristics of a Winning Team
- How to Find Great Team Members
- The Interview & Hiring Process
- How to Create Job Security for Everyone
- Accessing Behavior Styles & Personality Traits
- Team Meetings
- Training Responsibility and Effectiveness
- Performance Reviews and Recognition
- Accountability ~ Taking Ownership
- Compensation Evaluation
- Team Building
- Working Together Without Conflict
- Problem Solving Process
- Doctor's Leadership & Management Skills
- Personnel Files
- Review of Employment Agreements
- Review of Payroll System and Records
- Documentation of Discussions & Action Taken

*As soon as this assessment has been completed, please fax it to Joy at 888.413.4931.*