Priorities & Risk Assessment

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.

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