



# PRACTICE MANAGER MASTERCLASS

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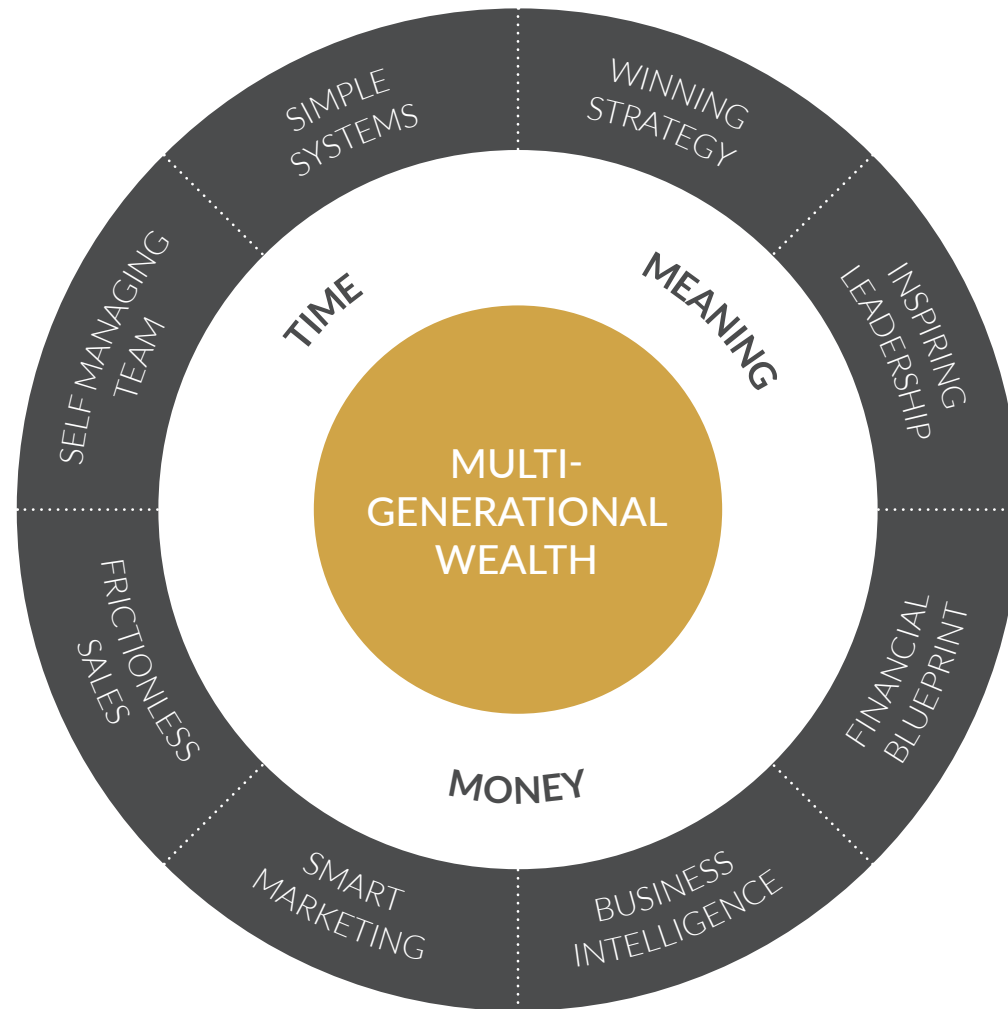
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Clear Your Plate	
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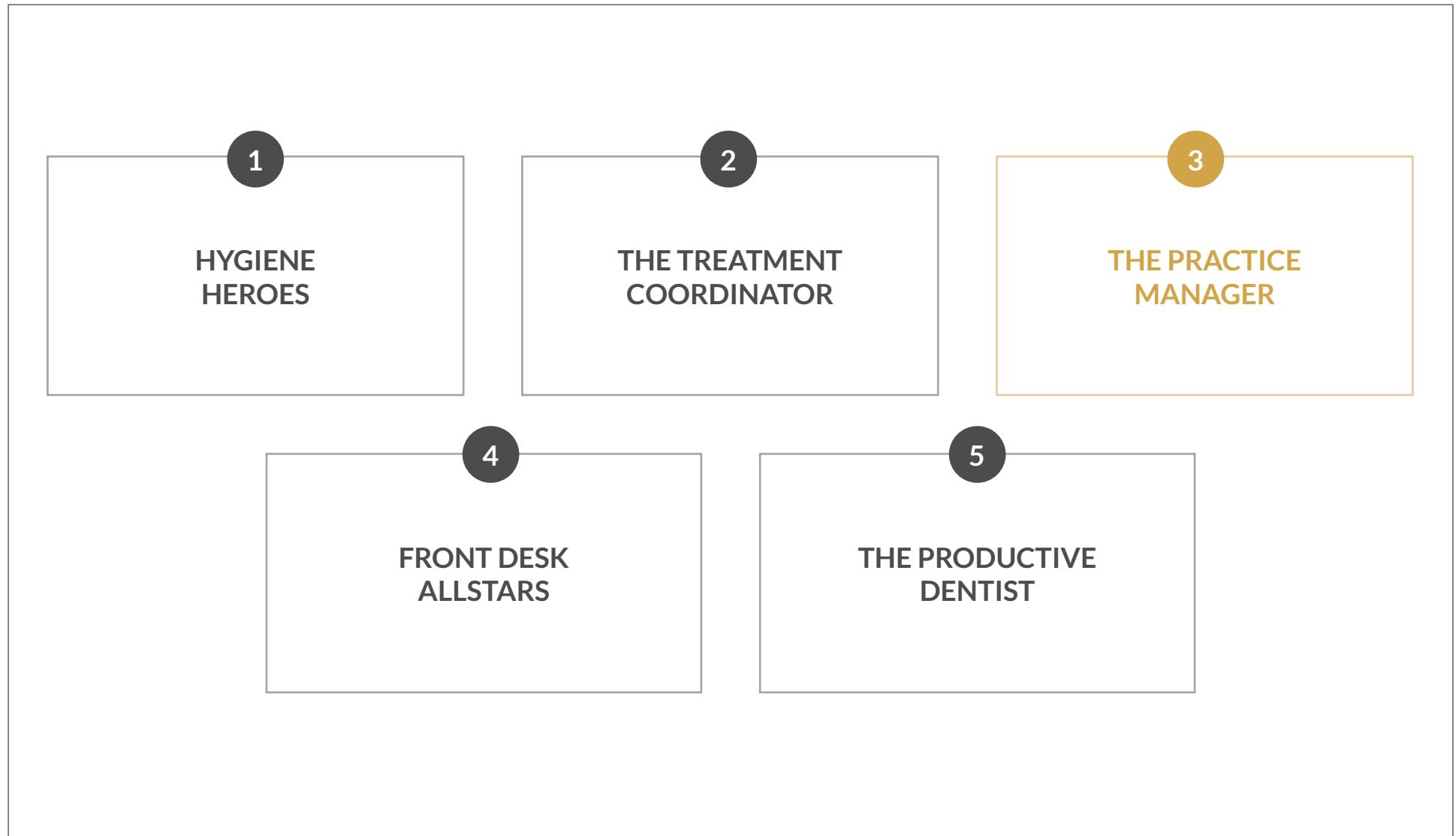
# SAVVY DENTIST OPERATING SYSTEM™

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# THE 5 TEAM TRAININGS

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# INSIGHTS AND ACTIONS

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MODULE	INSIGHTS / TAKEAWAYS	ACTIONS
01 Understand the Role		
02 Drive Cashflow		
03 Manage Assets		
04 Lift Team Performance		
05 Communicate Effectively		
06 Develop Impact Players		
07 Control your Time		
08 Meet with Purpose		

## CAPTURE PAGE – BIG IDEAS

## NOTES



MODULE 1

# UNDERSTAND THE ROLE

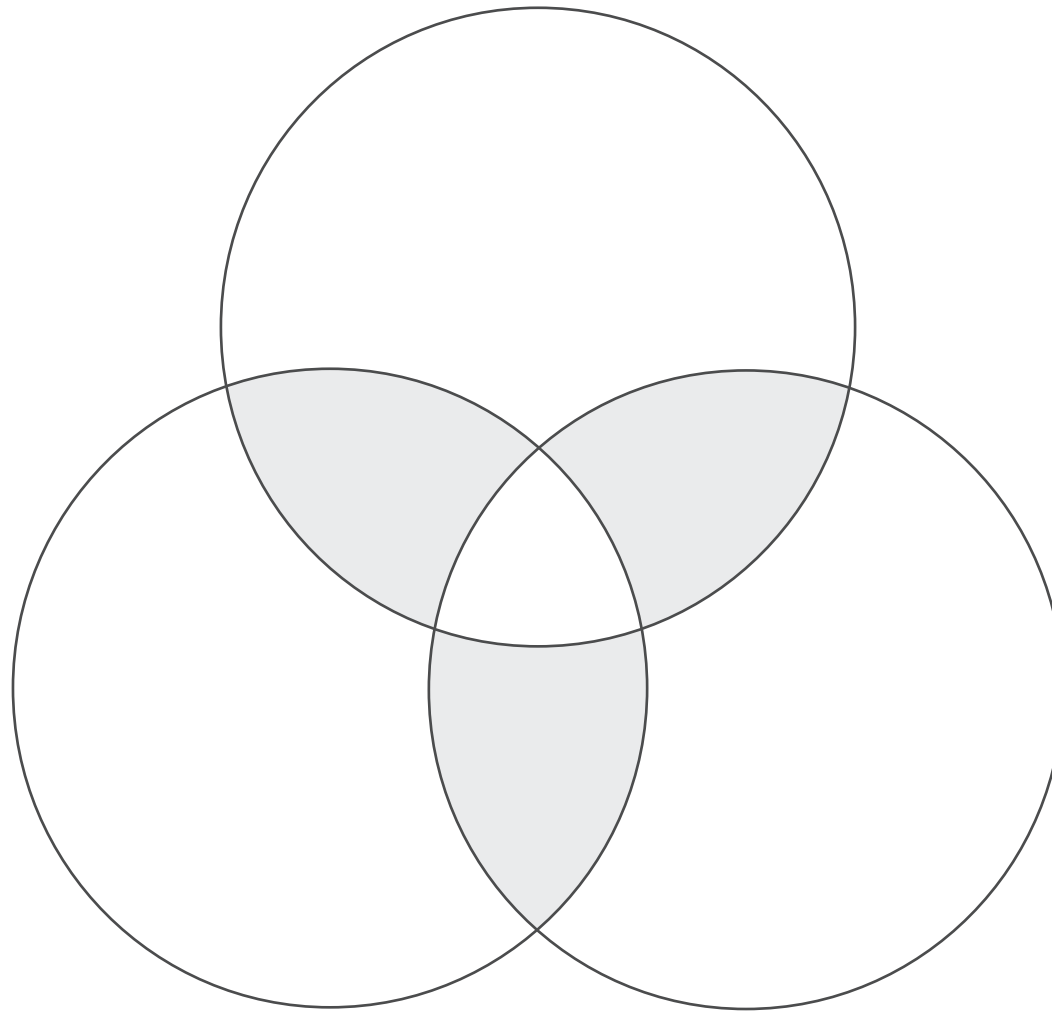
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# WHO DOES WHAT?

PRACTICE MANAGER	ADMIN	OTHER

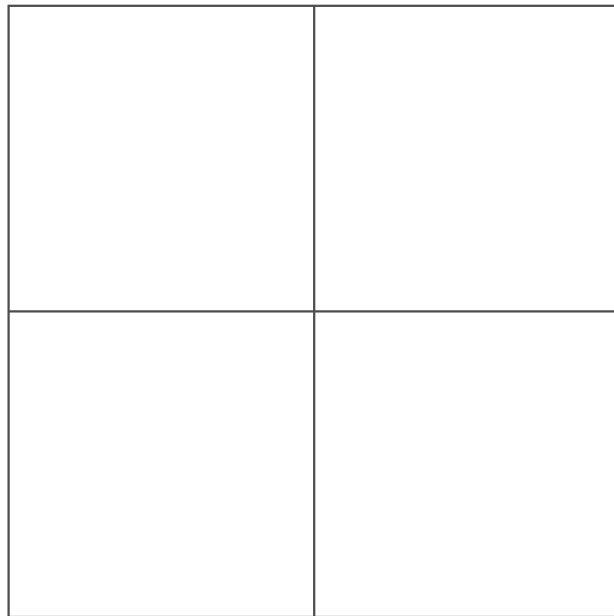
## WHAT THE OWNER WANTS

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# THE 4 TYPES OF ASSETS

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# PRACTICE MANAGER SCORECARD - FINANCE

## OBJECTIVES:

1. Accurate and timely financial reporting to update business owner
2. Accurately maintain and interpret case tracking data
3. Achieve Revenue, EBOC targets
4. Manage expenses within budgets
5. Manage accounts receivable and accounts payable

## AS MEASURED BY:

KPI	Standard
Revenue Target (Monthly)	\$xx00
EBOC Target	\$xx00
Consumables % (excluding implants)	5-7%
Wages % (Non-Clinical)	15-18%
Lab %	10 -12 %
Marketing %	1-2 %
Case Conversion %	>80%

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Appointment Book structured with pre-blocks	100%
Stand-by list used to fill-in cancellations	95%
In-complete Tx's, Cancellations & FTA followed-up	95%
All accounts receivable collected	95%
Account terms utilized for accounts payable	100%
Staff rostering using production units	95%
Tracking spreadsheets updated	100%
Case-tracking done	100%

## NOTES

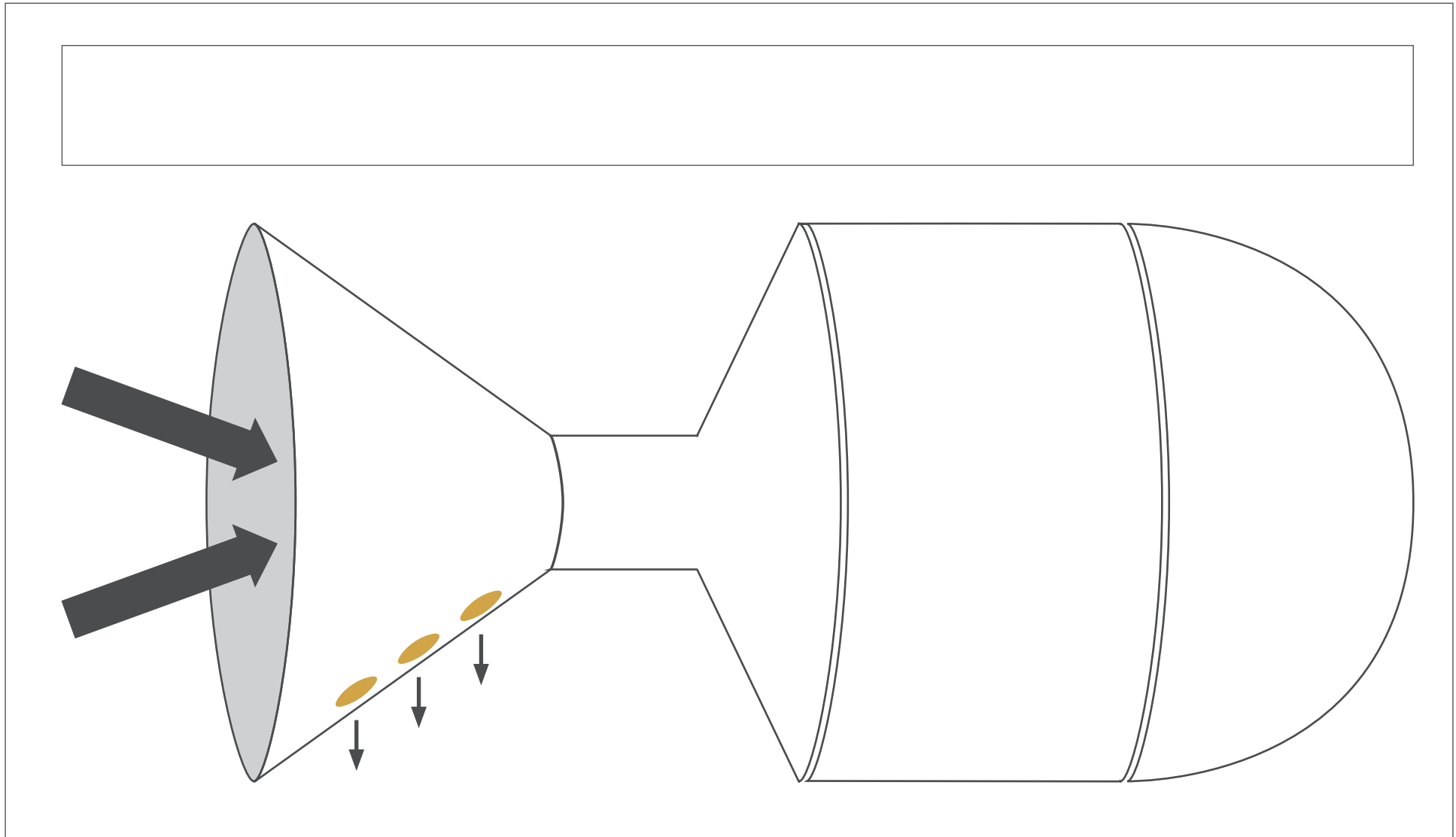
MODULE 2

# DRIVE CASHFLOW

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## THE SDOS MONEY MACHINE<sup>©</sup>

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## MAXIMISE YOUR REVENUE

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	CURRENT SITUATION	DESIRED SITUATION	THE GAP	ACTION PLAN
See more patients				
See patients more frequently				
Increase the \$ per visit				

## 3 WAYS TO MAXIMISE REVENUE – THOUGHT STARTERS

SEE MORE PATIENTS	SEE PATIENTS MORE OFTEN	INCREASE SIZE OF TRANSACTION
<ul style="list-style-type: none"> <li><input type="checkbox"/> Marketing – see Marketing Snapshot</li> <li><input type="checkbox"/> Asking for referrals               <ul style="list-style-type: none"> <li><input type="checkbox"/> Verbally</li> <li><input type="checkbox"/> In writing</li> </ul> </li> <li><input type="checkbox"/> Multiply the booking</li> <li><input type="checkbox"/> Check family member appointments</li> <li><input type="checkbox"/> Follow up incomplete treatment</li> <li><input type="checkbox"/> Attract new patients with more treatment options</li> <li><input type="checkbox"/> Retain patients</li> <li><input type="checkbox"/> Reactivation campaign</li> <li><input type="checkbox"/> Prevent cancellations</li> <li><input type="checkbox"/> Convert emergency patients into practice patients</li> <li><input type="checkbox"/> Increase capacity               <ul style="list-style-type: none"> <li><input type="checkbox"/> Add chairs</li> <li><input type="checkbox"/> Split shifts</li> <li><input type="checkbox"/> Longer opening hours</li> <li><input type="checkbox"/> Reduce appointment time</li> <li><input type="checkbox"/> Use two rooms</li> <li><input type="checkbox"/> Four handed dentistry</li> <li><input type="checkbox"/> Properly utilise auxiliary staff</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Tailored hygiene recall</li> <li><input type="checkbox"/> Tight recall system</li> <li><input type="checkbox"/> Build value</li> <li><input type="checkbox"/> Pre-book appointments (leave with next visit booked)</li> <li><input type="checkbox"/> Prevent cancellations</li> <li><input type="checkbox"/> Convert emergency patients into practice patients</li> <li><input type="checkbox"/> Fill last minute gaps</li> <li><input type="checkbox"/> Priority / VIP list</li> <li><input type="checkbox"/> Pre-frame timing during treatment planning and case presentation</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Increase case acceptance rates</li> <li><input type="checkbox"/> Increase range of services</li> <li><input type="checkbox"/> Promote new service to existing patients</li> <li><input type="checkbox"/> Payment plans</li> <li><input type="checkbox"/> Increase fees</li> <li><input type="checkbox"/> Appropriate item number usage</li> <li><input type="checkbox"/> Stop giving discounts</li> <li><input type="checkbox"/> Properly utilise auxiliary staff</li> </ul>

## MAXIMISE YOUR CASH FLOW

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# MAXIMISE YOUR CASH FLOW

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## MANAGE WORK IN PROGRESS

- ☐ Ensure Lab SOPs are up to date
- ☐ Install a tracking process
- ☐ Minimise timeframes for work complete (line up labs)

## COLLECT ACCOUNTS RECEIVABLE

- ☐ Ensure financial terms are up to date and intact
- ☐ Use 3rd party credit providers where necessary

## REDUCE OPERATING EXPENSES

- ☐ 60 Day Bill pay Action Plan
- ☐ Calculate total subscriptions
- ☐ Calculate ROI on investments

## MANAGE YOUR INVENTORY DAYS

- ☐ Robust stock ordering system
- ☐ Install par levels (min & max quantities)
- ☐ Minimise wastage
- ☐ Streamline inventory (only one type / brand)
- ☐ Identify process constraints & bottlenecks

## UTILISE PAYABLE TERMS

- ☐ Pay bill on last day
- ☐ Pay with credit card and maximise benefits
- ☐ Negotiate longer terms with suppliers
- ☐ Avoid late charges

## REDUCE COSTS OF GOODS SOLD

- ☐ Efficient rostering
- ☐ Negotiate prices with vendors
- ☐ Wages linked to performance, not tenure

# THE TRACKING SUMMARY



**PM Coach:** Based on your forecast goals, insert the monthly goal for numbers of PB here.

**PM Coach:** Data on this page allows us to analyse your ability in presenting TX to existing and new patients. Comparisons can be drawn as to whether your ability is skewed towards existing or new patients.

Lastly, analysing average \$ diagnoses and acceptances allows a deeper understanding of your case acceptance and whether it is being driven potentially by over or under diagnosing.

FILL IN THE YELLOW AREAS ONLY

## TRACKING SUMMARY - Case Acceptance

Examination Data Summary	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Pre-block Value	0	0	0	0	0	0	0	0	0	0	0	0	NA
Pre-blocks Planned	0	0	0	0	0	0	0	0	0	0	0	0	0
Pre-blocks Filled	0	0	0	0	0	0	0	0	0	0	0	0	0
Pre-blocks Success	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
EP1 Diagnosed	0	0	0	0	0	0	0	0	0	0	0	0	0
EP1 Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0
EP1 Case Acceptance	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
NP1 Diagnosed	0	0	0	0	0	0	0	0	0	0	0	0	0
NP1 Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0
NP1 Case Acceptance	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total All Diagnosed	0	0	0	0	0	0	0	0	0	0	0	0	0
Total All Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Case Acceptance	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
EP Emergency Predicted	0	0	0	0	0	0	0	0	0	0	0	0	0
EP Emergency Predicted %	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
NEMP Comp. Exam Booked	0	0	0	0	0	0	0	0	0	0	0	0	0
NEMP Comp. Exam Booked %	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Average Amount per Patient (\$)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total Ave.
EP1 Diagnosed	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
EP1 Accepted	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
NP1 Diagnosed	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
NP1 Accepted	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

**PM Coach:** This data shows your ability to gain case acceptance from existing patients.

**PM Coach:** This data shows your ability to gain case acceptance from new patients.

**PM Coach:** This shows the average \$ amounts diagnosed and accepted per patient type. It allows comparisons between your case acceptance rates and average \$ diagnoses/acceptances.

If case acceptance is high, this may be explained in part by low \$ diagnoses. If case acceptance is low, this may be explained by high \$ diagnoses.

# EXPENSE BENCHMARKS

## MAJOR EXPENSES

1. EMPLOYEE EXPENSES	
✓ Non clinical staff wages:	15-18%
✓ Hygienist (wage or hourly rate):	4-12% OR 1/3 of their revenue
✓ Hygienist (Contractor):	30-35%
✓ Fringe Benefits:	1-2%
✓ Assistant Dentists (Contractors):	30-40% of (Revenue - Lab Expense - Implant Expense)
<b>Total Employee Expense - Without Hygienists:</b>	<b>16-20%</b>
<b>Total Employee Expense - With a Hygienist:</b>	<b>20-30%</b>
<b>Sweet Spot:</b>	<b>25%</b>
<b>2. LAB:</b>	<b>10-12%</b>
<b>3. FACILITY:</b>	<b>5-7%</b>


<b>4. SUPPLIES:</b>	<b>5-7% excluding implant supplies</b>
<b>5. PROMOTION / ADVERTISING:</b>	<b>ROI</b>
<b>TOTAL MAJOR EXPENSES</b>	<b>37- 57% **</b>

\*\* You will note a wide range here. It is not good practice to maintain each of the 5 major expense categories at the upper end of the range norm

<b>OPERATIONAL EXPENSES</b>	<b>10 -12%</b>
<b>DISCRETIONARY</b>	<b>&lt; 10%</b>
<b>EBOC</b>	<b>MINIMUM &gt; 25%</b>
<b>** EBIT</b>	<b>15 - 20%</b>
<small>(after owner dentist commission removed)</small>	

**Notes:** These KPI Benchmarks are for a General Practice Expenses are expressed as a Percentage of Total Revenue unless otherwise indicated.

# PATIENT TRACKING



**PM Coach:** "IMPORTANT!" Enter each patient each time they visit for consultation. **Cease entering the patient details when final TX decision is made.** (IE do not record when they attend actual TX)

**PM Coach:** Referral source only for NP1 or NEMP patient types - DISC, R, ADT, ADV, O  
\*\* Code explanation in Tracking Summary - Gen Info tab

**PM Coach:** Enter patient type codes - EPI, NP1, EEMP, NEMP  
\*\* Code explanation in Tracking Summary - Gen Info tab

**PM Coach:** If existing patient emergency is predicted, enter Y only. No other data needed. If diagnosis made during EEMP visit, enter details on new line as EPI.

**PM Coach:** If new patient emergency can be converted to NP1, enter Y only. No other data needed. When NEMP comes back for comp. exam, record in a new row now as NP1.

**PM Coach:** If only checkup/scale/clean no diagnosis, enter Y then record \$ diagnosed & \$ accepted as 0. No other data needed.

**PM Coach:** For all final diagnoses made, record the \$ diagnosed and accepted here.  
\*\* If patient seeks to consider TX options, record "\$ diagnosed" accordingly and record 0 for "\$ accepted". If TX is ultimately accepted, then change "\$ accepted" appropriately from 0. If TX is declined outright then no changes necessary. Make notes in column Q where applicable.  
\*\* Acceptance is defined as the patient making the booking for TX.

**PM Coach:** Calculate the # of PBs filled by the accepted diagnosis based on \$ amt and the number of appointments required to fulfil TX.

**PM Coach:** Insert the following code for the procedure which makes up the bulk of the diagnosis - C/V/N, BR, IMP, VIS, ENDO, O  
\*\* Code explanation in Tracking Summary - Gen Info.

**PM Coach:** Include notes here, for example if previous "incomplete TX acceptance" is now fully complete or not wanted.

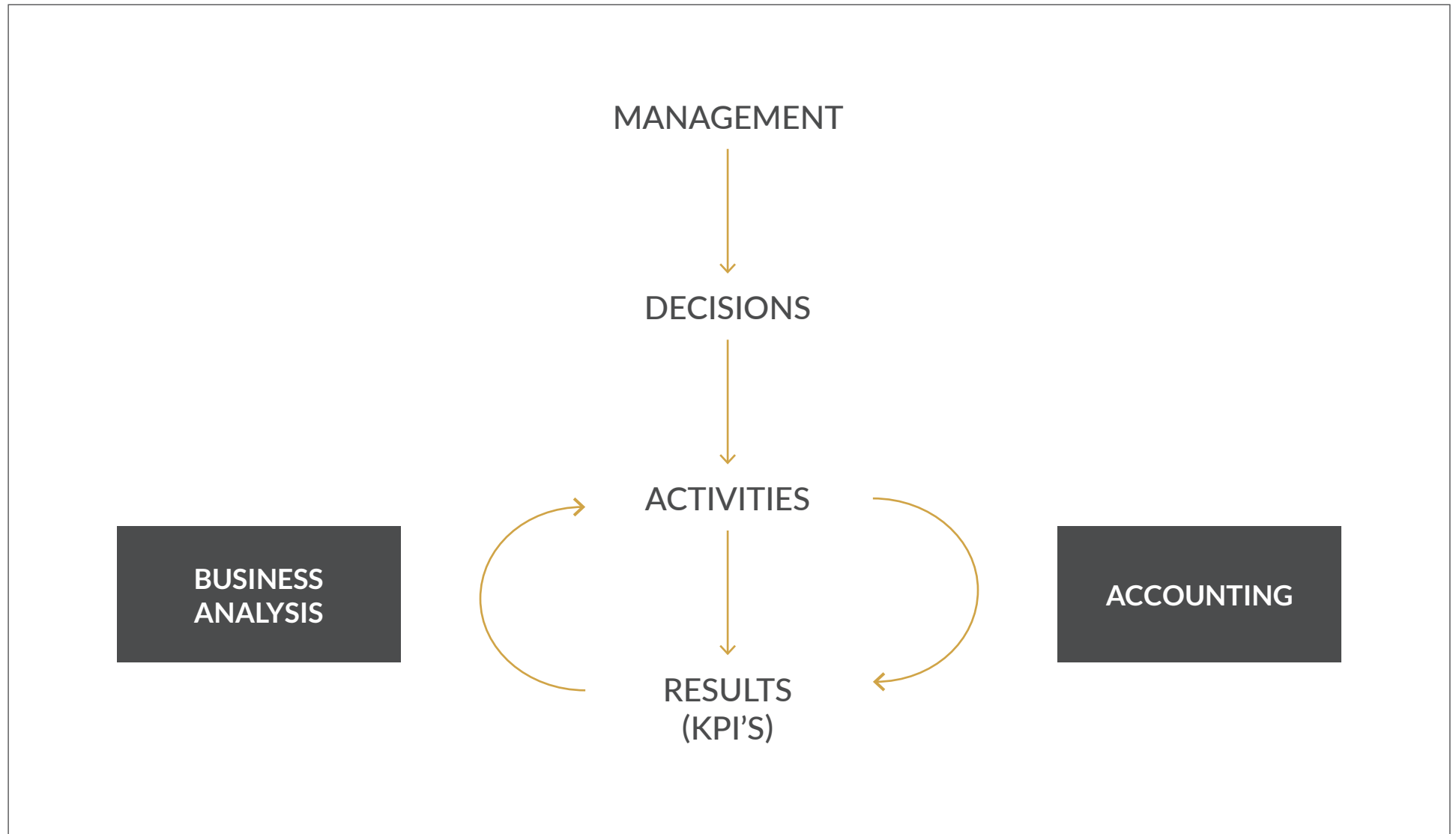
**FILL IN THE YELLOW AREAS ONLY**

**PATIENT TRACKING**

	PATIENT DATA						EXAMINATION DATA							
	Name	Referral source	Date	Patient Type	Referral Sought (Y/N)	Referral Sought By	EEMP Predicted (Y/N)	NEMP Comp. Exam Booked (Y/N)	Checkup only/ Scale & Clean/ No diagnosis (Y/N)	\$ Diagnosed	\$ Accepted	Pre-blocks Filled	Procedure	Notes
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														

# THE DASHBOARD

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# THE RESULTS DASHBOARD

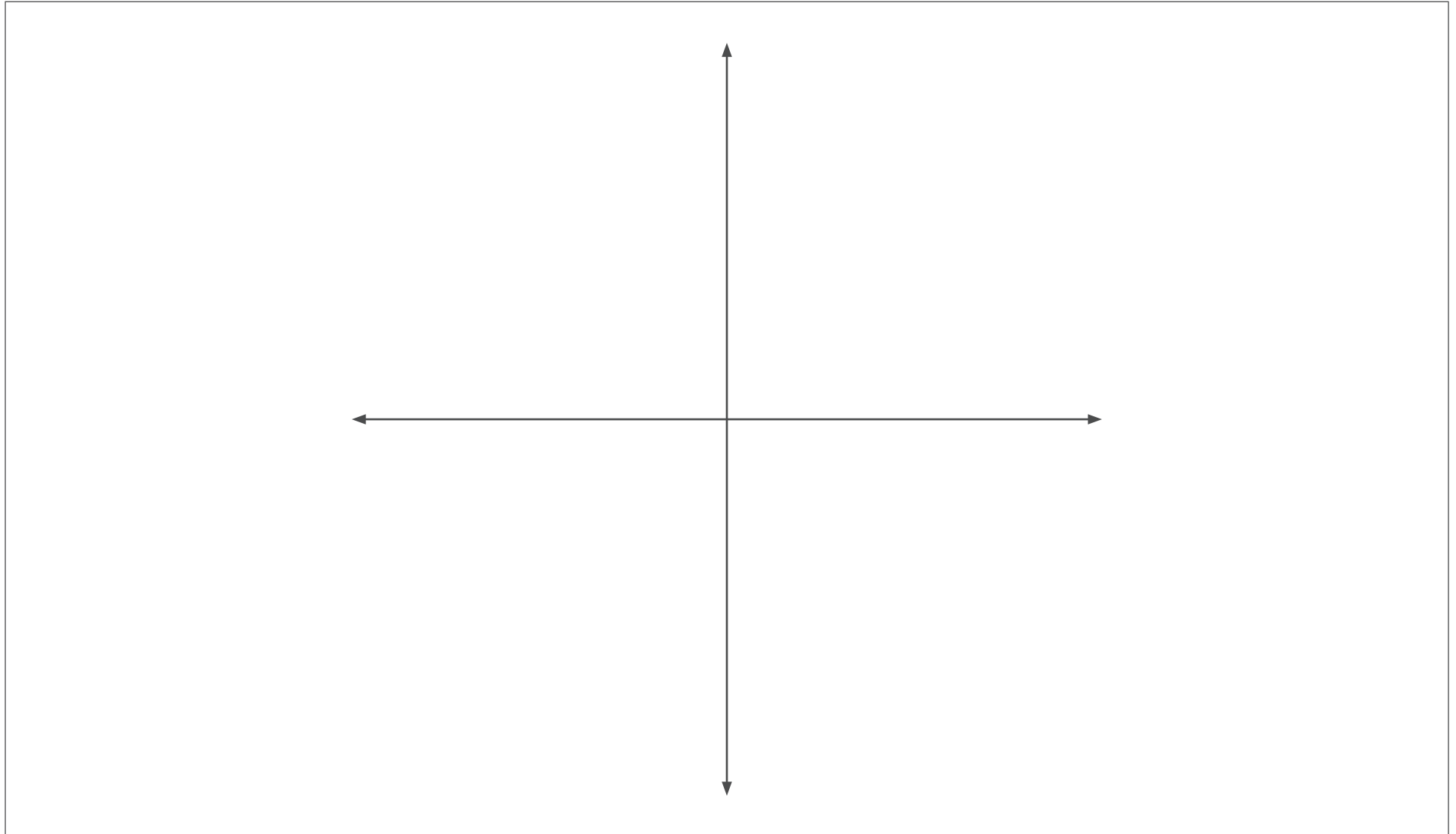
KEY PERFORMANCE INDICATORS											
FINANCIAL PERFORMANCE											
TEAM	NUMBERS			UNITS OF PRODUCTION / PRE - BLOCKS		CASE ACCEPTANCE					
	Total	Days worked	Per day	Planned	Filled	%	Outstanding Debts				
Dr. 1	\$		\$				Patients Lost				
Dr. 2	\$		\$				Emergencies booked for an exam				
Dr. 3	\$		\$								
NEW PATIENTS											
Total new patients:	Sources	Referral:	Web:	Advert:	Signage:	Other:					
CRITICAL DRIVERS											
MARKETING AND FULL BOOKS	Standard versus Achieved			OPERATIONS							
Asking for referrals	Standard:	Achieved:		High Energy Huddle		Standard:	Achieved:				
Asking for reviews	Standard:	Achieved:		Admin time cor rectly used		Standard:	Achieved:				
Multiply the bookings	Standard:	Achieved:		Meaningful Team Meeting s		Standard:	Achieved:				
Build value for next visit	Standard:	Achieved:									
Next visit pre - appointment	Standard:	Achieved:									
Recalls sent	Standard:	Achieved:		CASE ACCEPTANCE							
Incomplete Treatment	Standard:	Achieved:		Present 3 units per day		Dr. 1	Y/N	Dr. 2	Y/N	Dr. 3	Y/N
Reactivation	Standard:	Achieved:		Separate treatment consults for the week							

# PRE-BLOCK YOUR APPOINTMENT BOOK

CHAIR 1	HYGIENE

## PRODUCTION PRE-BLOCKS

---



# BUILD YOUR IDEAL DAY

Time	1	2	3	4	5	6	7	8	Time
8:00									8:00
8:10									8:10
8:20									8:20
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16:30									16:30
16:40									16:40
16:50									16:50
17:00									17:00

# NOTES

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A large rectangular box containing 15 horizontal dotted lines for taking notes.

## NOTES

MODULE 3

# MANAGE ASSETS

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# MAINTENANCE LOG

EQUIPMENT	AGE OF EQUIPMENT	EXPECTED LIFE SPAN (A-D)	DATE OF SERVICE	NEXT SERVICE DUE	FAULTS	ACTION TAKEN (A-D)	SERVICE TECHNICIAN	CONTACT DETAILS	SOP	NOTES REQUIRED



# THE SPEEDY SOP™

Procedure Name:	
Date:	
Version:	
Aim of the Procedure:	
Importance of the Procedure:	
References and Resources:	

STEPS	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

# ROSTERING

CHAIRS	CLINICIAN	DA	RECEPTION	FLOATER NURSE
1	1	1	1	0
2	2	2	1	0
3	3	3	1+	0
4	4	4	2	0
5	5	5	2	1

# MANAGE ASSETS

ORDERING	INVENTORY MANAGEMENT

# NOTES

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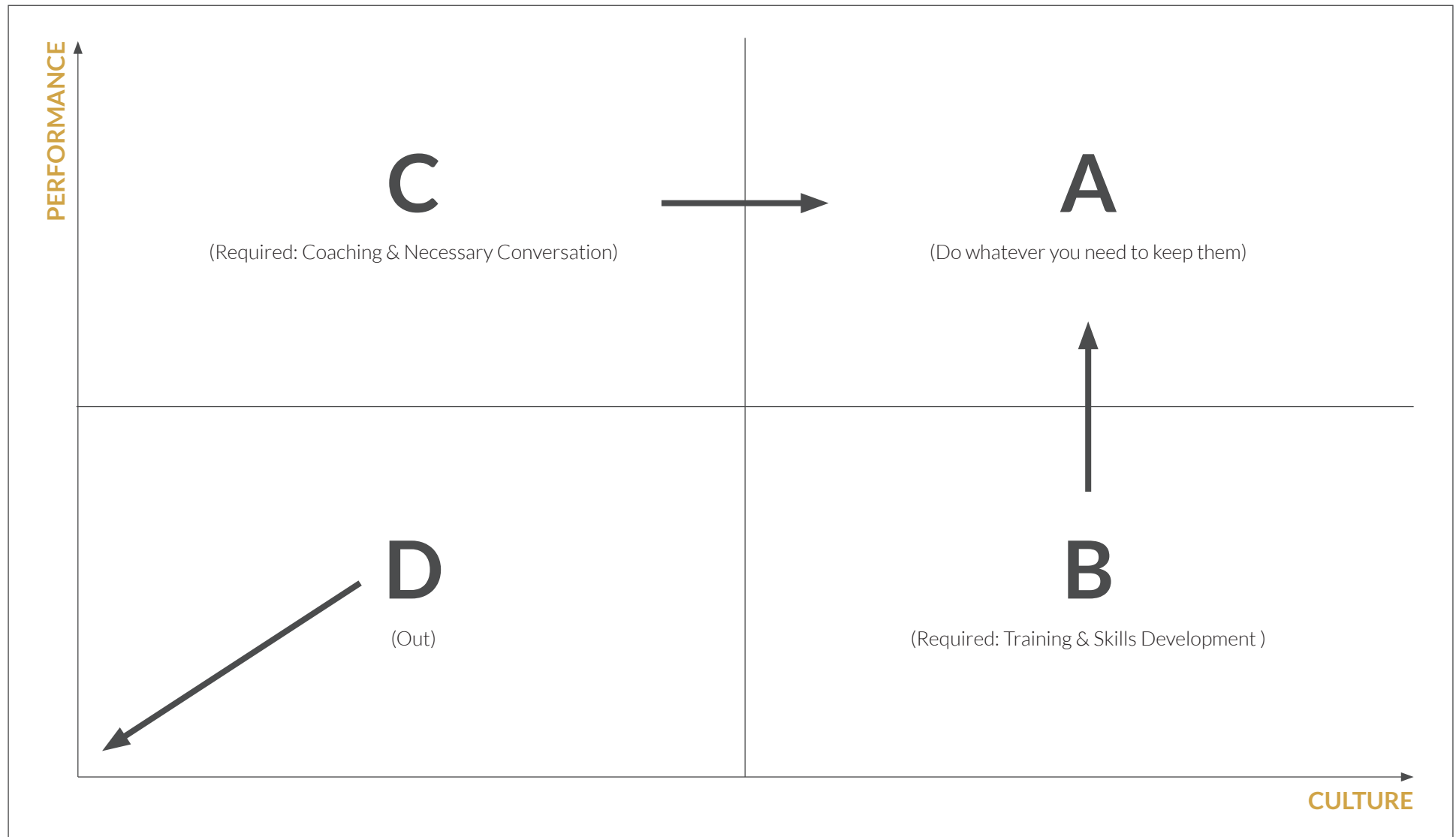
A large rectangular box with a thin black border, containing 15 horizontal dotted lines for writing notes.

MODULE 4

# LIFT TEAM PERFORMANCE

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# THE PERFORMANCE CULTURE MATRIX



Inspired by Keith Cunningham

Credit: Gino Wickman

# PERFORMANCE PLAN – NEXT STEPS

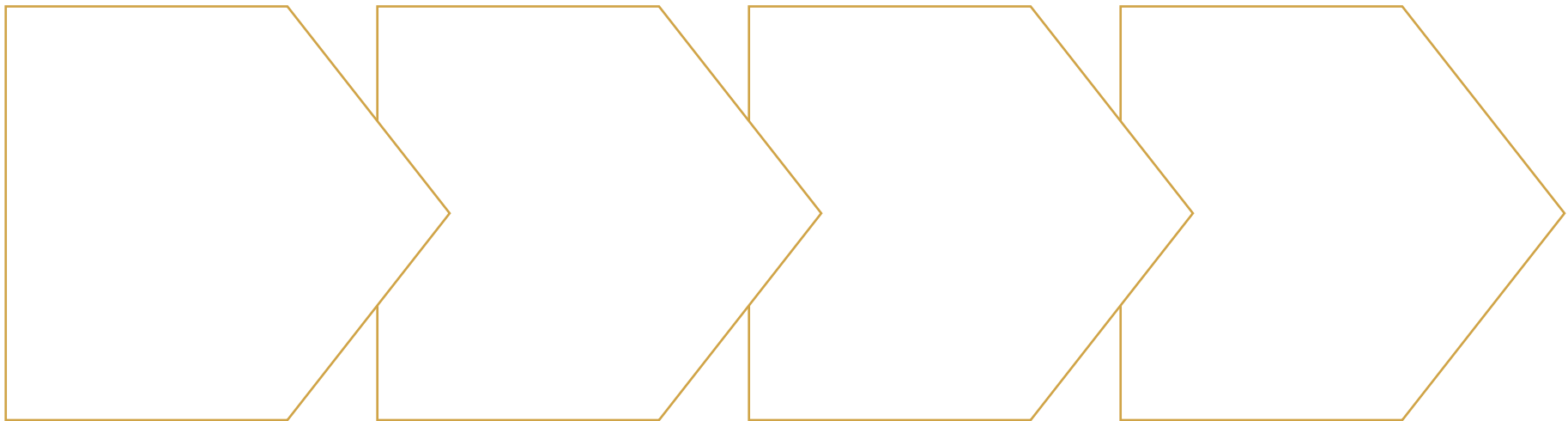
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NAME	QUADRANT (A-D)	ACTION STEPS	RESOURCES REQUIRED



# THE COACHING CONFERENCE PROCESS

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# COACHING CONFERENCE FRAMEWORK

## PROCESS

1. **Pre-frame:** Establish rapport and enroll the employee in the process
2. **Questions to explore:** Identify & resolve opportunities & challenges
3. **Set Actions with measurable outcomes & review times:** Agree KPIs and when they will be regularly reviewed

<b>GOAL</b>	<ul style="list-style-type: none"> <li>• Tell me, what is it that you want from your time here?</li> <li>• What is it that motivates you? What drives you?</li> <li>• What is the outcome you are looking for?</li> </ul>
<b>REALITY</b>	<ul style="list-style-type: none"> <li>• On a scale of 1-10, how do you feel about your employment here?</li> <li>• What is it that makes you give that score?</li> <li>• Overall, how would you rate your performance out of 10? And what do you think are the predominant factors that determine that?</li> <li>• How are you? Is everything OK?</li> <li>• I feel like X. Do you feel like that, or otherwise? Why?</li> <li>• I have noticed that XYZ; what are your thoughts around that?</li> <li>• Can you tell me what happened</li> </ul>
<b>OPPORTUNITY</b>	<ul style="list-style-type: none"> <li>• How would you like to be performing in (these areas)?</li> <li>• At what level would you like your performance to be?</li> <li>• What do you think a 10 out of 10 looks like?</li> <li>• Do you have any ideas about how you might be able to resolve this challenge with X?</li> </ul>
<b>WAY FORWARDS</b>	<ul style="list-style-type: none"> <li>• Which idea are you prepared to implement first?</li> <li>• Is there a way that I/we can support you to resolve this?</li> <li>• What lessons can you/we learn from this?</li> <li>• What needs to happen for this to be rectified now and minimise future errors?</li> <li>• So if you were to implement these ideas, you'll be on top of it? If not, what else needs to happen?</li> </ul>

# THE PERFORMANCE PLAN

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NAME	REVIEW DATE	
DATE	STAFF SIGNATURE	PRACTICE SIGNATURE
OUTCOMES	ACTIONS	
SUCCESS CRITERIA	RESOURCES	

# COACHING CONFERENCE PREPARATION SHEET – PRACTICE OWNER

---

## **PRACTICE OWNER'S SCRIPT FOR OPENING DISCUSSION WITH EMPLOYEE.**

We have provided you with the Employee preparation self – assessment survey. I would firstly like to thank you for completing it.

Today, we are going to run through your self - assessment results and discuss how these relate to my answers to the same questions.

I want us to discuss the common threads and differences between how you feel performing and how I believe you are performing in your role.

As you know, [Practice Name] is an ambitious business. We believe high performance is visible through three key actions;

- Absolute honesty (examining what we have done well and what we need to improve);
- Delivery of an action plan, and;
- Accountability for the results.

Your participation in the coaching process is important. So, let's discuss each answer and compare our results.

### **1. I have reviewed your performance against the Position Description and KPIs.**

---

Notes on comparison of responses.

# COACHING CONFERENCE PREPARATION SHEET – PRACTICE OWNER

---

**2. My rating on how I think you have performed in your current role?** (Scale 1-10)

\_\_\_\_

Notes on comparison of responses.

**3. What progress have you made in the role since our last Coaching Conference?**

Notes on comparison of responses.

# COACHING CONFERENCE PREPARATION SHEET – PRACTICE OWNER

---

## 4. Culture Fit

How well do you exhibit Value 1? Provide examples.

---

How well do you exhibit Value 2? Provide examples.

---

How well do you exhibit Value 3? Provide examples.

## 5. Are you aware of the critical drivers of the business and your job-specific critical drivers?

Critical Drivers of the business.

---

Your job-specific Critical Drivers

---

Notes on comparison of responses.

## COACHING CONFERENCE PREPARATION SHEET – PRACTICE OWNER

---

**6. What would I like to see you accomplish between now and the next Coaching Conference. How will success be measured? (i.e. how will we know when you have achieved it?)**

What would I like to see you accomplish?

---

How will I be looking to measure your success?

**7. How happy are you in your role?** (Scale 1-10) 1 being very unhappy and 10 being extremely happy

\_\_\_\_

---

What are the key elements that contribute to your happy rating today?

**8. List 3 things you can do to help the business become the best it can be.**

*Thank you for participating in this process.*

# DENTAL RECEPTION / FRONT DESK SCORECARD

## OBJECTIVES:

1. To ensure every patient on the database is retained.
2. To ensure every patient has a future appointment
3. To ensure the patient base grows through internal marketing
4. Any lost patients are recouped through reactivation
5. The daily production budget is achieved

## AS MEASURED BY:

KPI	Standard
Patient details up to date	100%
Rebooking rate	95%
Recall success rate	90%
Cancellation / FTA rate	<3%
New patients	1 per day
Reactivated patients	1 per day
Daily Production Dentist 1	\$xx00
Daily Production Dentist 2	\$xx00

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Every patient's details checked at appointment	100%
Every patient leaves with appointment	95%
Ask for review	3 per day
Ask for referral	2 per day
Multiply booking	80%
5-star reminder system for recall	100%
Preblocks filled appropriately - MS	2 per day
Preblocks filled appropriately - RS	1 per day



## I-MESSAGES

---



# I-MESSAGES

---

## I-MESSAGE EXERCISE

Write I-Messages for three conflict situations in your workplace.

1.

2.

3.

## NOTES

## NOTES

MODULE 5

# COMMUNICATE EFFECTIVELY

---

# THE APPRECIATION APPLICATOR™

## MY LOVE LANGUAGE:

Give: ..... Receive: .....

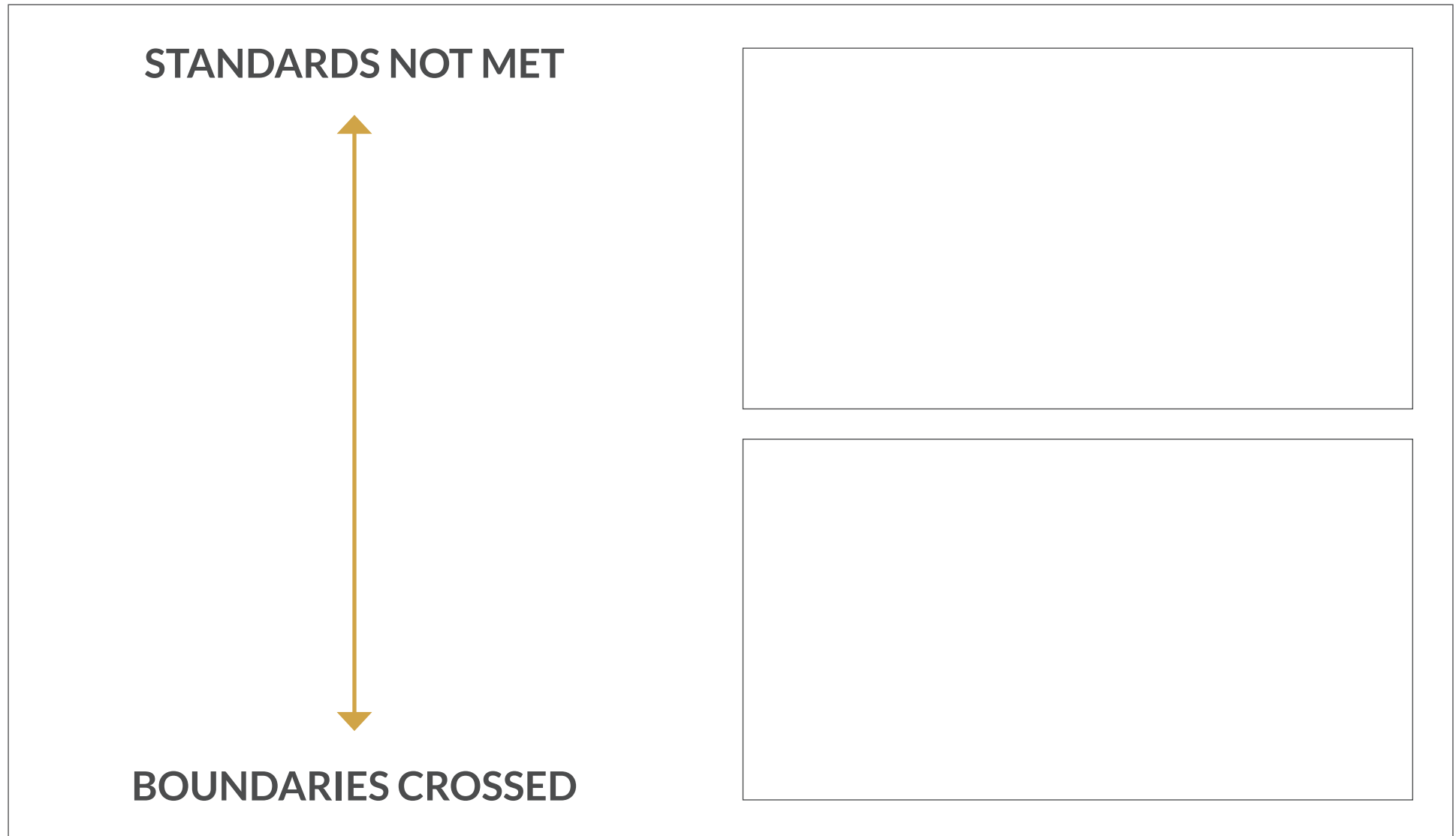
NAME OF TEAM MEMBER	LOVE LANGUAGE (receive)	EXAMPLE OF EXCELLENCE	HOW TO SHOW APPRECIATION

Credit: Gary Chapman - The 5 love languages



## BOUNDARIES & STANDARDS

---

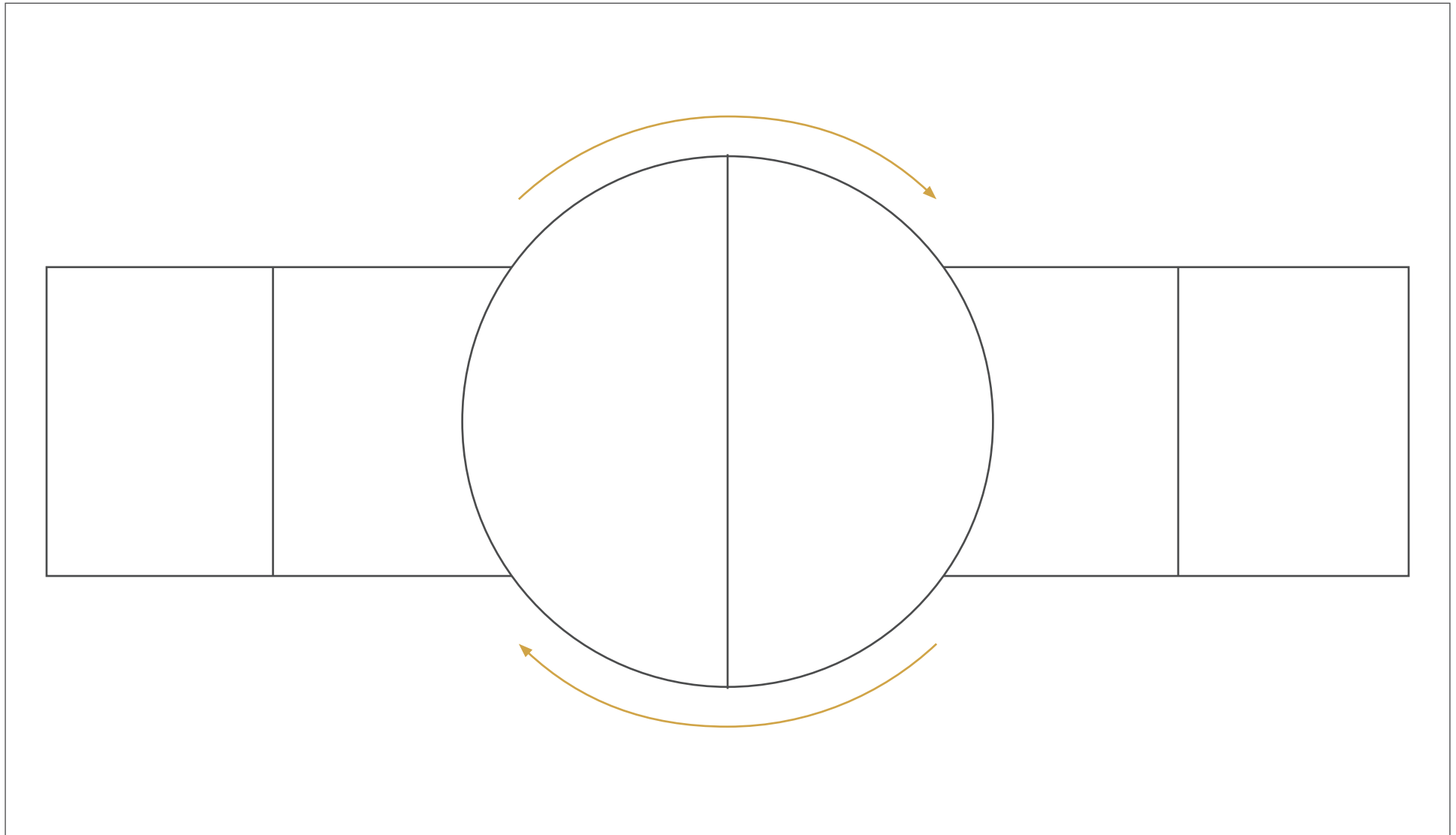


## NOTES



## THE NECESSARY CONVERSATION FLOW™

---



# THE NECESSARY CONVERSATION PLANNER™

## THE PROCESS

(spoken)

<b>1. PRE-FRAME</b> Duration: Topic: Objective:  <input type="checkbox"/> Permission	<b>2. FACTS</b> Seen: Heard: Know:  <input type="checkbox"/> Agreement
<b>3. THEIR PERSPECTIVE</b> Tell me why?  Help me understand:  <input type="checkbox"/> They feel heard	<b>4. MY PERSPECTIVE</b> Meaning: Impact: Outcome:  <input type="checkbox"/> They understand
<b>5. PATHWAY</b> Actions: Support/Resources: Change:  <input type="checkbox"/> Commitment	<b>6. FOLLOW UP</b> Facts: Check in: Questions:  <input type="checkbox"/> Outcome

## TO CONSIDER

(unspoken)

<b>PREPARATION</b> Date and Time: Environment: Resources:
<b>EMOTIONS PRESENT</b> Me:  Them:
<b>TRIGGERS</b> Me:  Them:

# THE DECISIVE RELEASE™

## THE PROCESS

(spoken)

<b>1. PRE-FRAME</b>  The purpose of this conversation is to reflect on how you are going in the practice and your performance in the role period.	<b>2. REVIEW</b>  You will recall we had previous conversations about how you are tracking, and those conversations led to commitments and actions that would contribute to your improved performance and contribution to the team.
<b>3. IT'S NOT WORKING</b>  We have had the conversations with the hope that things would improve. Candidly, they have not, to the point where I believe I don't see a long term future together.  From my perspective, as the boss, its no longer working.	<b>4. LET THEM GO</b>  For that reason, I/we think its time you look for alternative employment and we are actively looking for an alternate candidate for the role
<b>5. LOGISTICS</b>  By law, I'm required to give you x weeks' notice, and all your entitlement will be paid in full. If you find something sooner, that's ok. You'll be required to return property belonging to the practice. We will do everything to honour our end of the contract, and we expect you to do the same.	<b>6. QUESTIONS</b>  Do you have any questions?  I understand its not an easy conversation to be on the end of. This is not the end of the road for you, just in this workplace. I'm sure you will go on to bigger and better things.

## TO CONSIDER

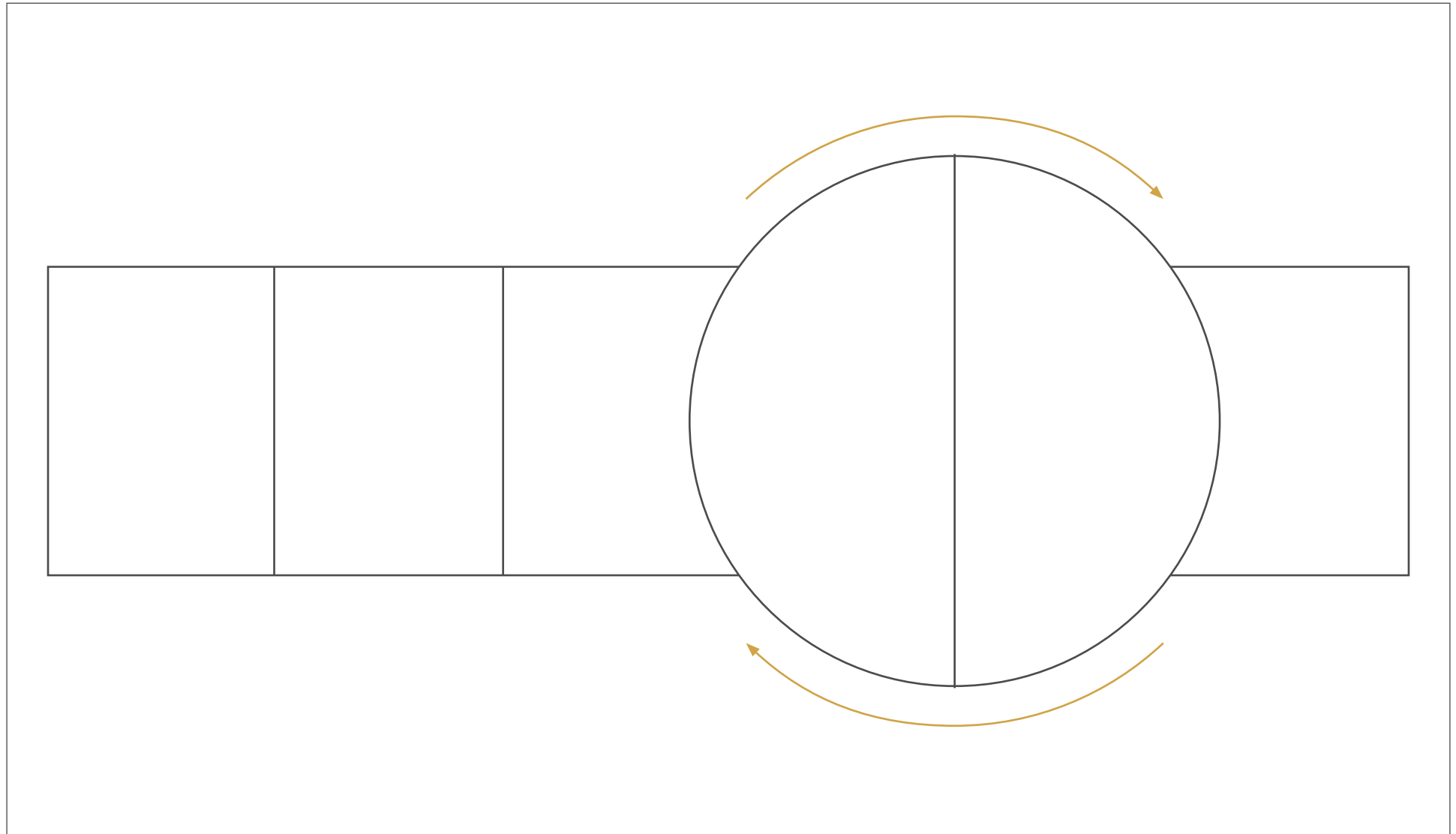
(unspoken)

<b>ENVIRONMENT</b>  Date and Time:  Environment:  Resources:	<b>EMOTIONS &amp; TRIGGERS</b>  Me:    Them:	<b>LEGAL</b>  Contracts  Notice period  Dismissal laws  Compliance
--------------------------------------------------------------------------------	----------------------------------------------------------------	--------------------------------------------------------------------------------------------

## NOTES

# DEALING WITH COMPLAINTS

---



# COMPLAINT HANDLING SYSTEM

Map Your Practice's Complaint Handling Process

	Where/Who	How do I know when this step is complete?
<b>STEP 1</b> Use a framework for handling the complaint conversation and gathering information		
<b>STEP 2</b> Record and log the complaint		
<b>STEP 3</b> Appoint staff member to handle the complaint from start to finish		
<b>STEP 4</b> Gather internal information - clinical records, interview staff etc		
<b>STEP 5</b> Present information to practice principal.		
<b>STEP 6</b> Decide if complaint warranted. If complaint warranted, decide what remedy will be offered to patient		
<b>STEP 7</b> Identify improvements to be made. Create and document systems / SOP's where possible		
<b>STEP 8</b> Team training re complaint (if appropriate) and any systems to be modified or implemented.		
<b>STEP 9</b> Communicate with complainant (using a framework) to outline remedy and improvements made from the exercise		

# DEALING WITH COMPLAINTS

ACKNOWLEDGE GRIEVANCE	VALIDATE	THANK YOU
<p><i>To confirm, what I understand is happening is . . .</i></p> <p><i>Am I correct?</i></p>	<p><i>I can see how that would be frustrating for you</i></p>	<p><i>And I'm sorry that's you have had this experience</i></p> <p><i>Thankyou for calling me about that</i></p>
WANTS	TEST POSSIBLE SOLUTION	NEXT STEPS
<p><i>Where would you like to go from here?</i></p>	<p><i>So if we were to do A + B + C, would that work for you?</i></p>	<p><i>So here is what we will do from here</i></p> <p><b>A</b></p> <p><b>B</b></p> <p><b>C</b></p> <p><i>How does that sound?</i></p>

## DEALING WITH COMPLAINTS

---

ACKNOWLEDGE GRIEVANCE	VALIDATE	THANK YOU
WANTS	TEST POSSIBLE SOLUTION	NEXT STEPS



## NOTES

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## NOTES

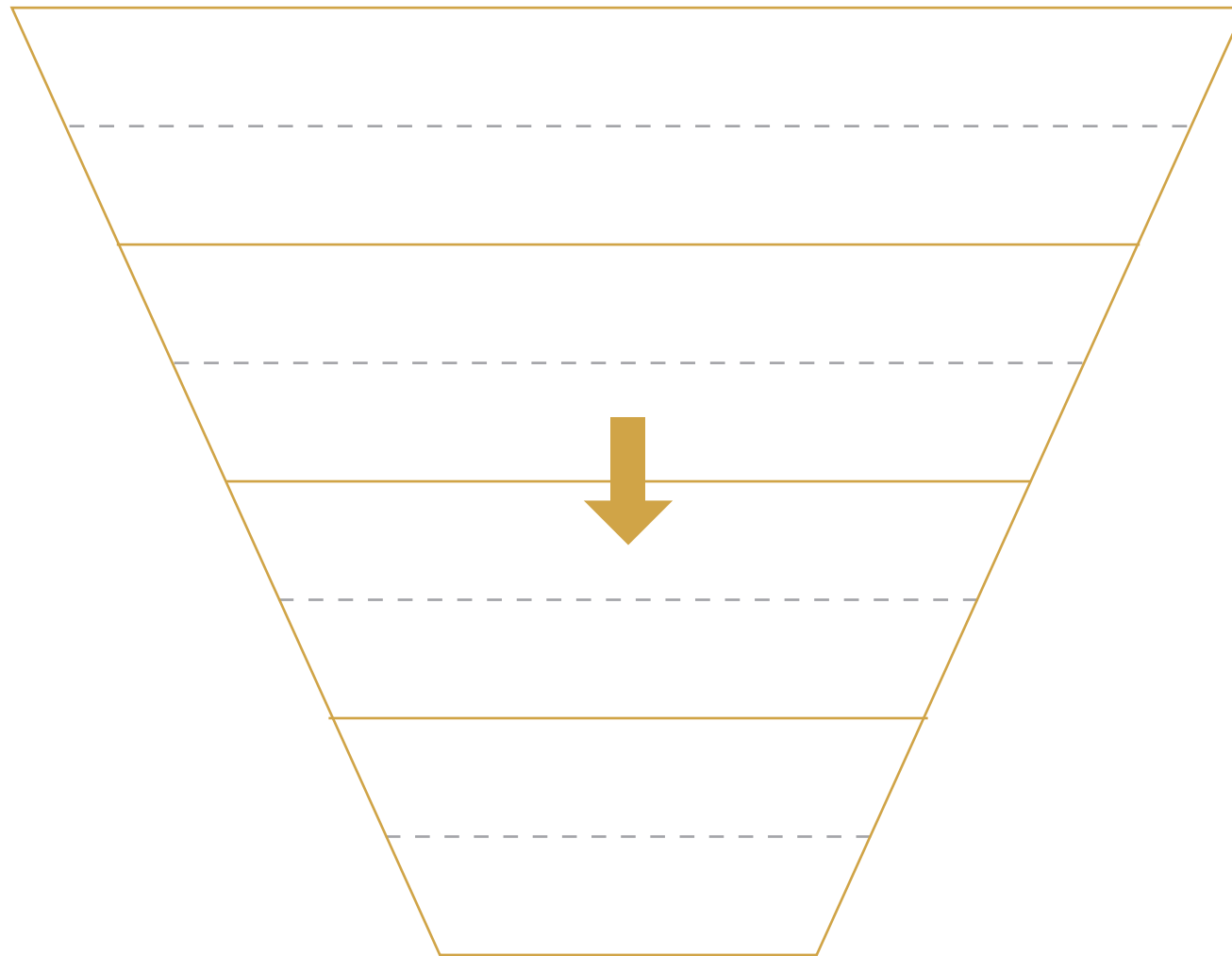
MODULE 6

# DEVELOP IMPACT PLAYERS

---

# THE TALENT PIPELINE

---



# THE MAGNETIC JOB OFFER™

<b>1. WELCOME</b> <p>"Thanks for meeting me ..."</p> <p><input type="checkbox"/> Rapport</p>	<b>2. PRE-FRAME</b> <p>"I'd like to ask a few more questions and see if we are a good fit. Is that Ok?"</p> <p><input type="checkbox"/> Permission</p>	<b>3. EXPLORE VALUE 1</b> <p>Confirm &amp; Clarify value</p> <p>Soft pitch about how you might meet that value</p> <p><input type="checkbox"/> Engagement</p>
<b>4. EXPLORE VALUE 2</b> <p>Confirm &amp; Clarify value</p> <p>Soft pitch about how you might meet that value</p> <p><input type="checkbox"/> Engagement</p>	<b>5. RECAP</b> <p>"It seems like we need to create a role that meets (Value 1 &amp; Value 2). Would that work for you?"</p> <p><input type="checkbox"/> Agreement</p>	<b>6. OUR CRITERIA</b> <p>Conditions of engagement</p> <p>Logistics</p> <p><input type="checkbox"/> Understanding</p>
<b>7. VALUE OFFER</b> <p>"You are looking for (Value 1 &amp; Value 2) We are looking for (top 3 criteria) "Assuming we were able to agree on money, is this a role you could see yourself in?"</p> <p><input type="checkbox"/> Commitment</p>	<b>8. REMUNERATION OFFER</b> <p><input type="checkbox"/> Clarity</p>	<b>9. NEXT STEPS</b> <p>If commit: contracts, etc</p> <p>If no commit: Timeframe to consider</p> <p><input type="checkbox"/> Promptness</p>

# EMPLOYEE HANDBOOK



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# EMPLOYEE HANDBOOK



## OUR CORE VALUES...

### BESPOKE DENTAL CORE VALUES



#### EXCELLENCE

- We strive for excellence in all we do.
- Excellence is in the detail – little things make a big difference.
- We're always learning.
- We believe in constant and never ending improvement.
- We are responsible for our own success.
- We have a Can-Do attitude.



#### HAVE FUN

- We take what we do seriously, we don't take ourselves so seriously.
- We have fun while still being professional and respectful.
- We approach each day with enthusiasm.
- We celebrate successes.



#### HONESTY

- We always do what is right.
- We do what we say we'll do.
- If we make a mistake we admit it, take responsibility and make amends.



#### CARING AND KINDNESS

- Everyone has the right to be treated with kindness and respect.
- We're courteous and polite.
- We care for each other, our patients, our suppliers and the business.
- We demonstrate care by knowing others.
- We give more than we take.



#### CONNECTION

- Connecting with others is why we're here.
- Our success is built upon relationships.
- We are present.
- We listen to understand.

September 2016

CV: Bespoke New Employee Onboarding Handbook 1 | 8

# EMPLOYEE HANDBOOK

## BESPOKE DENTAL CORPORATE CULTURE

### DO IT RIGHT THE FIRST TIME

We DON'T have time to do things twice....so lets get them done right the first time we do them.

### I AM HERE UNTIL IT IS DONE

We strive for excellence in all we do.

### BE PRESENT IN THE MOMENT

Being present at all times is a hard task to master.

Obviously in our clinical environment it is essential.

But in each and every interaction with patients and your team it is critical.

### GIVE PEOPLE AND TASKS THE FOCUS YOU DESERVE

You deserve to have the best results from all your communications and actions.

So give your focus to the people and tasks before you.

### WE GIVE BEYOND OUR OWN EXISTENCE

We give to make other peoples lives better.

We contribute to the global community through our Partnership with B1G1.

### B1G1

### HAVE FUN AND SMILE

#### HAVE FUN AND SMILE

Our Passion is our Play - it's infectious ☺

### YOU GET WHAT YOU PROJECT

#### YOU GET WHAT YOU PROJECT

You get what you project for and you're always projecting. Careful what you speak into existence.

September 2016

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## OUR IMAGE AND PRESENTATION...

### BESPOKE DENTAL IMAGE AND PRESENTATION

#### OUR BRAND, PRESENTATION AND IMAGE

We HAVE WORKED VERY HARD to establish our practice and build patient loyalty and patient flow so our brand - the way we are identified and known in the community - is very important to us, and to all team members.

#### WEARING YOUR UNIFORM IN THE PRACTICE

Our uniform says a lot about who we are. It provides patients with comfort and security. If we look professional we will be professional.

That's why it is important to the whole team that we all take good care of our uniforms, keep them washed and pressed and wear them with pride and with respect to their design elements.

For example: no additional brooches, or jewellery is to adorn the uniform.

#### WEARING YOUR UNIFORM IN PUBLIC

When you are in your Bespoke Dental uniform out in public we expect you to behave being mindful of the fact you are representing our brand.... your workplace and the team image. Poor behaviour by any one of us in public in uniform can impact on all of us through the loss of reputation and loss of patients.

#### PRESENTATION OF THE PRACTICE ENVIRONMENT

We insist that at all times all team members strive to achieve exceptional levels of cleanliness and hygiene and infection control.

You will be inducted to very strict policies and procedures around the cleanliness and hygiene of the practice. This includes the standards for managing infection control, waste disposal, clinical hygiene, general practice hygiene and personal hygiene before, between and after patient care.

A major part of these practices includes the hygiene around clinical consumables and equipment.

#### SUITABLE FOOTWEAR

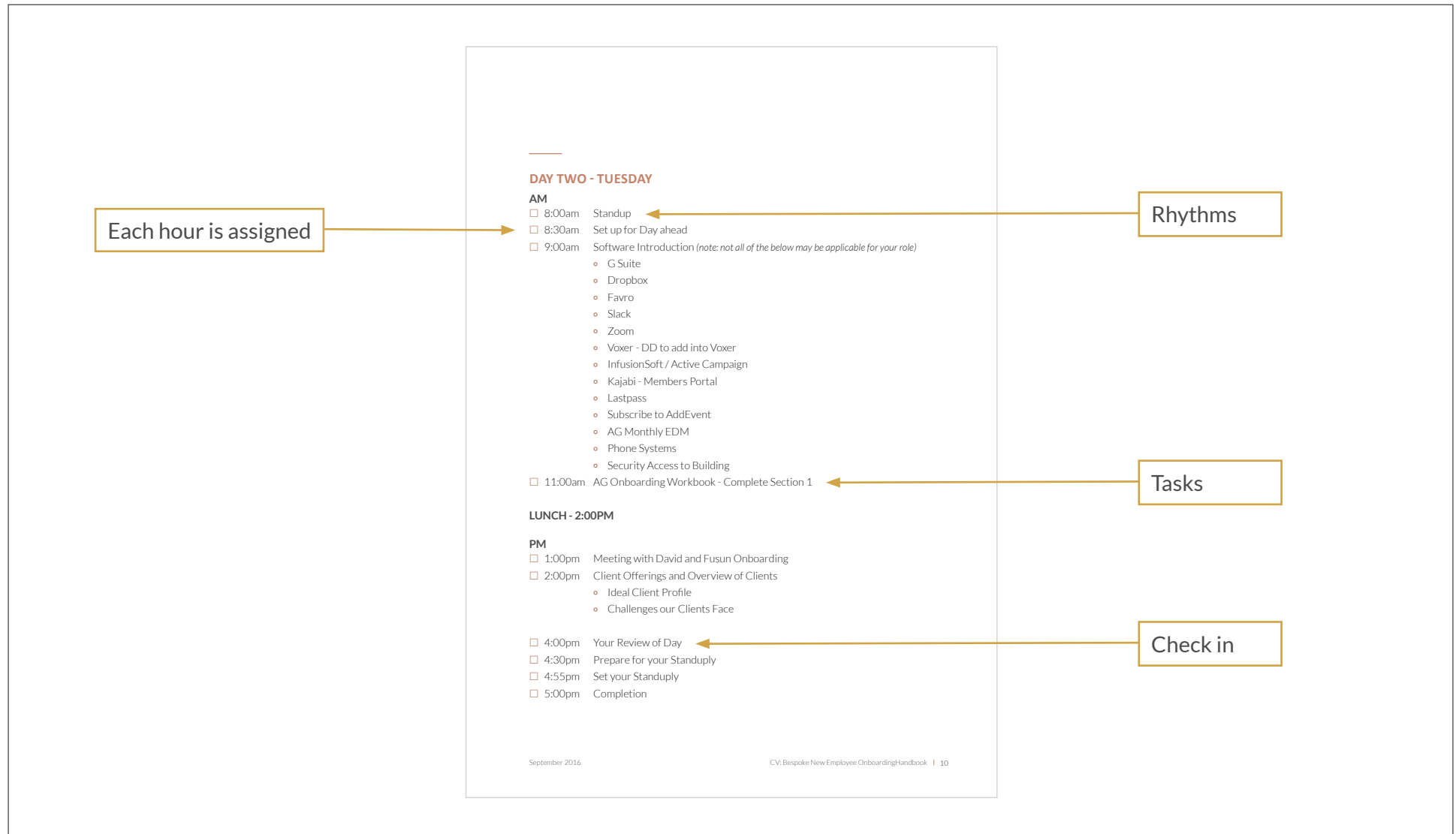
We insist that at all times all team members are in clean, ironed, uniforms, with appropriate safe and comfortable footwear.

September 2016

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# EMPLOYEE HANDBOOK



# THE TRAINING CHART

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Insert logo here	<b>Practice Manager - Training Chart</b>													
2			Tasks to be mastered in the first 4 weeks				Tasks to be mastered within the first 3 months								
3	<b>Task</b>	<b>Resources</b>	<b>Wk 1</b>	<b>Wk 2</b>	<b>Wk 3</b>	<b>Wk 4</b>	<b>Wk 5</b>	<b>Wk 6</b>	<b>Wk 7</b>	<b>Wk 8</b>	<b>Wk 9</b>	<b>Wk 10</b>	<b>Wk 11</b>	<b>Wk 12</b>	
4	<b>Human Resources</b>														
5	Recruitment process														
6	Onboarding new staff														
7	Training new staff														
8	Performance reviews														
9	Necessary conversations														
10	Managing conflict														
11	Rostering														
12	Managing leave														
13	Payroll / timesheets														
14	Organisational structure														
15	<b>IT</b>														
16	File structure														
17	Back up and management of password/login register														
18	<b>Compliance</b>														
19	Workplace health and safety, including MSDS														
20	Infection control														
21	Practice accreditation														
22	Health insurance companies														
23	Department of Veteran Affairs														
24	Medicare														
25	<b>Policies - review, update and manage</b>														
26	Workplace health and safety														
27	Infection control														

## NOTES

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# CLEAR YOUR PLATE

Review the Time Study Process and the 95 / 5 Rule and identify what tasks you'd like to automate, eliminate or delegate.

ELIMINATE	NEXT STEPS
AUTOMATE	NEXT STEPS
DELEGATE	NEXT STEPS

# WHAT PROBLEM DO YOU HAVE?

---



## SYSTEM

- Is there a system in place, and is it sufficient?

## TRAINING

- Has the person been trained effectively by an expert?
- Have they been sufficiently supported throughout the learning process?
- Do they have the equipment & resources to do an adequate job?

## PEOPLE

- Is this people problem requiring performance management?

# THE SPEEDY SOP™

Procedure Name:	
Date:	
Version:	
Aim of the Procedure:	
Importance of the Procedure:	
References and Resources:	

STEPS	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

# KEYS TO SUCCESSFUL DELEGATION

---

## 1 IDENTIFY

- It's their job, and you have been doing it
- It's a chance for them to learn and step-up

## 2 PROVIDE

- The Delegation Slip or The Speedy SOP
- Resources / equipment required

## 3 TRAIN

- I do / we do / they do / they create procedure
- Teach the software

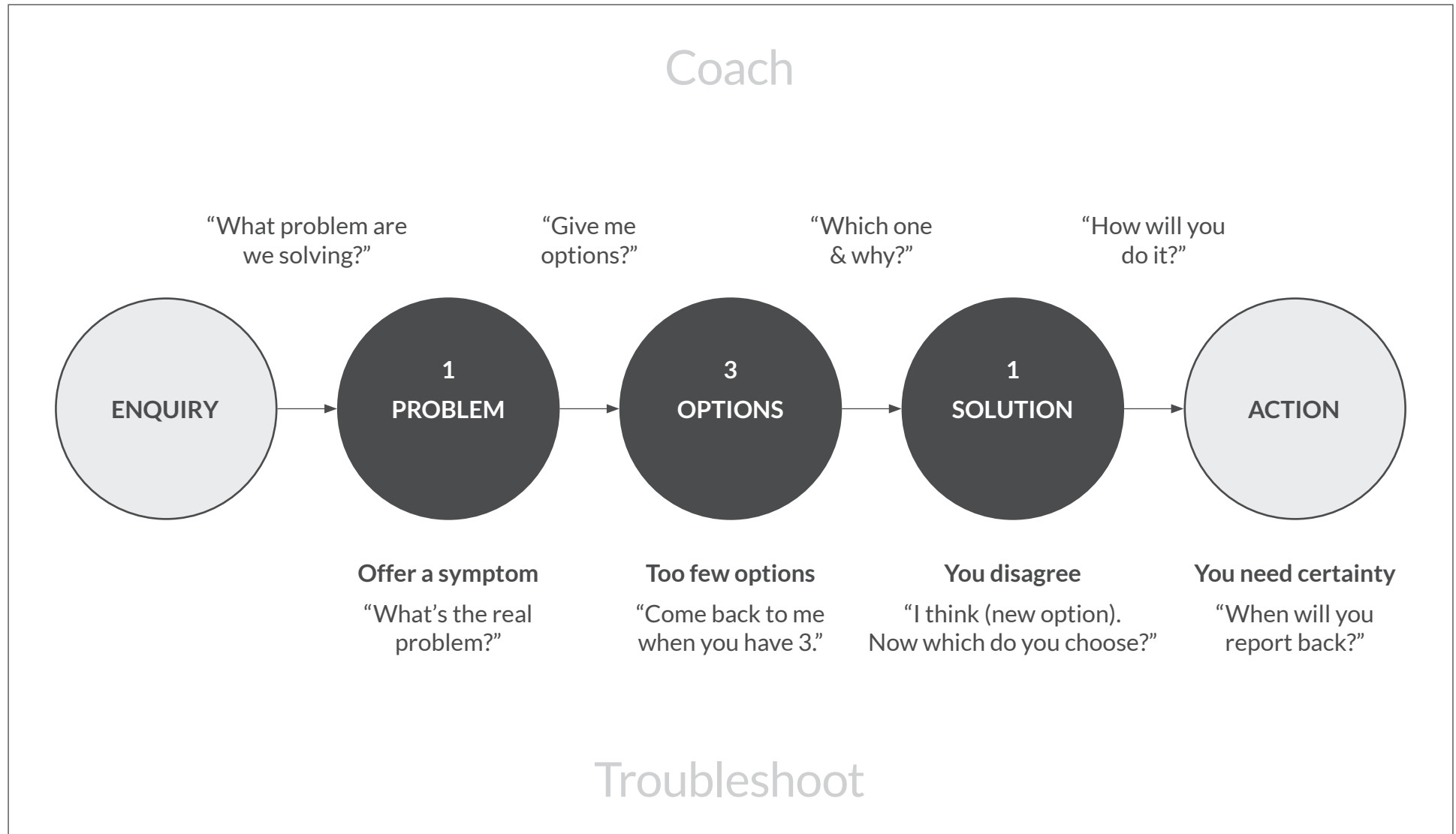
## 4 DO

- Allow time in their day to learn
- Keep them accountable

## 5 GROW

- Create time in your day to coach & troubleshoot
- Use mistakes as coachable moments (not an excuse to take back control)

# THE 3-MINUTE COACH





## NOTES

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## NOTES

MODULE 7

# CONTROL YOUR TIME

---

# TRACK YOUR DAY

Date:

TIME	ACTIVITY	
1am	00	15
	30	45
2am	00	15
	30	45
3am	00	15
	30	45
4am	00	15
	30	45
5am	00	15
	30	45
6am	00	15
	30	45
7am	00	15
	30	45
8am	00	15
	30	45
9am	00	15
	30	45
10am	00	15
	30	45
11am	00	15
	30	45

TIME	ACTIVITY	
1pm	00	15
	30	45
2pm	00	15
	30	45
3pm	00	15
	30	45
4pm	00	15
	30	45
5pm	00	15
	30	45
6pm	00	15
	30	45
7pm	00	15
	30	45
8pm	00	15
	30	45
9pm	00	15
	30	45
10pm	00	15
	30	45
11pm	00	15
	30	45

# DEFAULT DIARY

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
6am							
7am							
8am							
9am							
10am							
11am							
12am							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							
9pm							

## WEEKLY PLANNER

## THE MOST IMPORTANT THINGS WEEKLY PLANNER

PROJECT #1		PROJECT #2		PROJECT #3		WHO?	
						Connections : The people I need to connect with today	
Top 5 Priorities for this Project		Top 5 Priorities for this Project		Top 5 Priorities for this Project			
						Dependencies: The people I need to follow up to move things forward	
<b>WHAT?</b> This week's top priority. What I must complete this week no matter what?							
TOTAL HOURS THIS WEEK ON HIGH PRIORITY ACTIVITIES							

**Remember:**

- ✓ The 80-20 Rule
- ✓ Quadrant 2
- ✓ Your Critical Drivers
- ✓ Use Your Time as Intended
- ✓ Don't Get Hijacked
- ✓ Check Inbox at Day's End

# THE DAILY PRIORITY

---

<b>01 Sort your Tasks</b>	<b>Time</b> <ul style="list-style-type: none"><li>• Easy (5min)</li><li>• Medium (30mn)</li><li>• Large (1hr+)</li></ul> <b>Importance</b> <ul style="list-style-type: none"><li>• High impact</li><li>• Anxiety inducing</li></ul>
<b>02 Choose 1 thing</b>	Choose 1 big thing that, if you achieve it, will make you feel relaxed and successful.
<b>03 Calibrate Calendar</b>	Carve time in calendar for when you will get tasks done. <ul style="list-style-type: none"><li>• Do your 1 big thing early.</li><li>• Tell the team to leave you alone</li></ul>
<b>04 E.O.D Braindump</b>	End of the day, capture everything you need to do tomorrow

## CREATE DEEP FOCUS - The Pomodoro (24 or 45 mins)

---

### The Pomodoro

1. Choose action
2. Inform team
3. Phone / email on silent
4. All other applications closed
5. Capture page ready (for ideas)
6. Set and start timer
7. Avoid distractions





# INTERRUPTION ELIMINATOR

WHAT INTERRUPTS ME	ANY PATTERNS (Who, what, when, where, why)	IMPACT OF INTERRUPTION (Cost to me, my performance, the business, the team, the owner, patients)	STRATEGIES TO OVERCOME

## NOTES

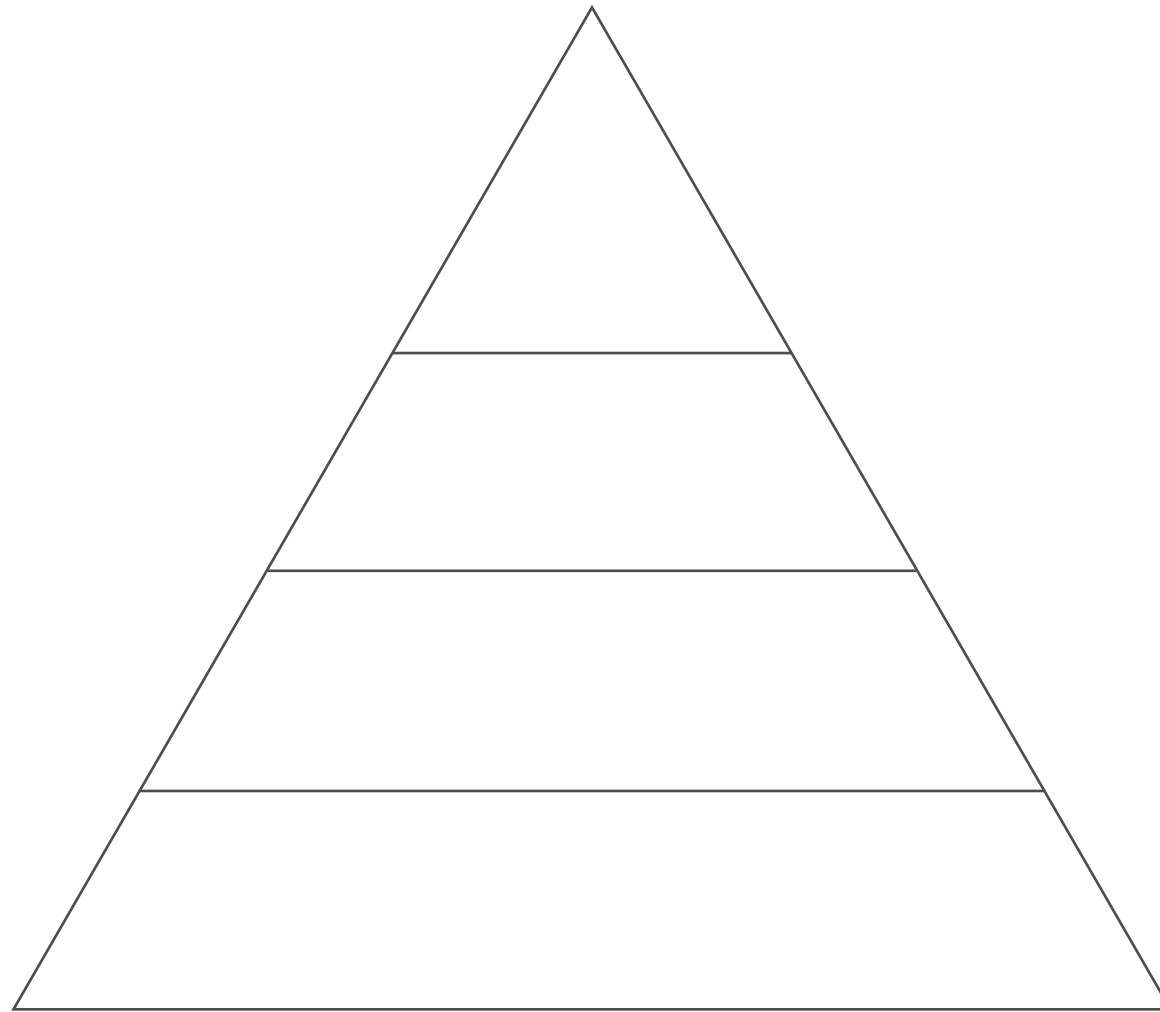
MODULE 8

# MEET WITH PURPOSE

---

## MEETING RHYTHM

---



# THE MORNING HUDDLE – AGENDA & FLOW

## 1. YESTERDAY (R / DA / H)

- Our one Big Win was:
- Number follow-up calls completed:
- One thing we could improve is (what & how):

## 2. TODAY (R / DA / H)

- Relevant patient information (patient file / treatment / marketing / delight):
- Problems that might arise today are:
- Appointment opportunities are (catch up / emergencies / checks):

## 3. NEXT APPT (R / DA / H)

- Production pre-block (next appt. & 3 potential patients)
- New patient exam (next appt.)
- Minor restorative (next appt.)
- Emergency Time (next appt. & team member)
- Hygiene only (next appt.)

## 4. FINANCES (R)

- Our Daily goal is per provider is:
- Yesterday each provider did \$
- Today we expect \$
- Brainstorm shortfalls:

## 5. LAB WORK (R)

- Lab work due today (has it arrived):
- Outgoing today is (booked and form complete):
- Internal lab materials available (eg. Cerec blocks):

## 6. MARKETING (R / DA)

- Results from yesterday's referrals are:
- Today We are asking these people for referrals or reviews:
- Our one 'patient delight' focus for today is:

## 7. ABOVE THE LINE (E)

## 8. CLOSING STATEMENT (D)

## 9. RATE THE MEETING (E)

**R:** Receptionist  
**DA:** Dental Assistant  
**H:** Hygienist / OHT

**D:** Dentist  
**E:** Everyone

# HUDDLE PREPARATION FORM – FRONT DESK / PRACTICE MANAGER

## YESTERDAY'S SCHEDULE

- ☐ The best thing that happened yesterday
- ☐ Follow up calls completed?
- ☐ What can be improved?

## TODAY'S SCHEDULE

- |                                                                                     |                                                                                                                  |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Problem areas?                                             | <input type="checkbox"/> ID patients needing follow up calls                                                     |
| <input type="checkbox"/> Relevant clinical information (e.g. regarding emergencies) | <input type="checkbox"/> When can emergencies be seen today?                                                     |
| <input type="checkbox"/> Significant past dental history                            | <input type="checkbox"/> Where are the opportunities to catch-up if required?                                    |
| <input type="checkbox"/> Who needs a new medical history?                           | <input type="checkbox"/> Personal information about the patient that can be used to greet and engage the patient |

## NEXT APPOINTMENTS

- |                                                                                                   |                                                                                    |
|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| <input type="checkbox"/> Production pre-block (Bring a name of who could fill the next pre-block) | <input type="checkbox"/> Emergency time (flexible appointment or pre-blocked time) |
| <input type="checkbox"/> New patient exam                                                         | <input type="checkbox"/> Hygiene only                                              |
| <input type="checkbox"/> Minor restorative                                                        |                                                                                    |

## LAB WORK

- |                                                           |                                                                                 |
|-----------------------------------------------------------|---------------------------------------------------------------------------------|
| <input type="checkbox"/> Confirm lab work for today is in | <input type="checkbox"/> Outgoing lab work booked with lab, lab forms completed |
|-----------------------------------------------------------|---------------------------------------------------------------------------------|

## FINANCES

- |                                    |                                                                         |
|------------------------------------|-------------------------------------------------------------------------|
| <input type="checkbox"/> Goal      | <input type="checkbox"/> Major financial arrangements for new treatment |
| <input type="checkbox"/> Yesterday | <input type="checkbox"/> Patients in today with delinquent accounts     |
| <input type="checkbox"/> Today     |                                                                         |

## MARKETING

- ☐ Results from asking for referrals yesterday
- ☐ Who to ask for referrals today
- ☐ How to delight patients

## NOTES

# THE RESULTS DASHBOARD

KEY PERFORMANCE INDICATORS											
FINANCIAL PERFORMANCE											
TEAM	NUMBERS			UNITS OF PRODUCTION / PRE - BLOCKS		CASE ACCEPTANCE					
	Total	Days worked	Per day	Planned	Filled	%	Outstanding Debts				
Dr. 1	\$		\$				Patients Lost				
Dr. 2	\$		\$				Emergencies booked for an exam				
Dr. 3	\$		\$								
NEW PATIENTS											
Total new patients:	Sources	Referral:	Web:	Advert:	Signage:	Other:					
CRITICAL DRIVERS											
MARKETING AND FULL BOOKS	Standard versus Achieved			OPERATIONS							
Asking for referrals	Standard:	Achieved:		High Energy Huddle		Standard:	Achieved:				
Asking for reviews	Standard:	Achieved:		Admin time cor rectly used		Standard:	Achieved:				
Multiply the bookings	Standard:	Achieved:		Meaningful Team Meeting s		Standard:	Achieved:				
Build value for next visit	Standard:	Achieved:									
Next visit pre - appointment	Standard:	Achieved:									
Recalls sent	Standard:	Achieved:		CASE ACCEPTANCE							
Incomplete Treatment	Standard:	Achieved:		Present 3 units per day		Dr. 1	Y/N	Dr. 2	Y/N	Dr. 3	Y/N
Reactivation	Standard:	Achieved:		Separate treatment consults for the week							



# WEEKLY TEAM MEETING

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<b>DASHBOARD</b> 20 mins	<b>PROGRESS REPORT</b> GREEN / RED	<b>ROADBLOCKS</b> / STUCK	<b>ACTION PLAN</b> / STUCK
<b>PROJECTS</b> 40 mins	<b>PROGRESS REPORT</b> GREEN / RED	<b>ROADBLOCKS</b> / STUCK	<b>ACTION PLAN</b> / STUCK
<b>OTHER ITEMS</b> 20 mins	<b>LIST AGENDA</b> SORT BY IMPACT	<b>ROADBLOCKS</b> / STUCK	<b>ACTION PLAN</b> / STUCK

# THE WEEKLY TEAM – PROJECT PREP SHEET

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Project:

<b>WINS</b>	<b>ACTION PLAN</b>
<b>PROGRESS</b>	<b>ROADBLOCKS</b>

## NOTES

## NOTES

# RESOURCES

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# PRACTICE MANAGER SCORECARD - INVENTORY MANAGEMENT

## OBJECTIVES:

1. Set and adhere to monthly budget on consumables spend
2. Ensure all consumables are adequately stocked at all times
3. Establish minimum ordering quantities for all consumables
4. Monitor stock regularly to minimize waste
5. Research suppliers to get best pricing for consumables

## AS MEASURED BY:

KPI	Standard
EOD checklist and re-stocking all surgeries	100%
Minimum Ordering Quantities followed	100%
Consumables spend within budget	100%
Minimize waste due to expired stock	\$xx00

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Stock take everyday	100%
All surgeries stocked End of Day	100%
Review and approve all stock orders	100%
All stock deliveries cross-checked with invoice	100%
Business Owner approval for orders over \$xx00	100%

# PRACTICE MANAGER SCORECARD - PEOPLE MANAGEMENT

## OBJECTIVES:

1. Provide leadership to broader practice team and lead team to achieve business vision
2. Co-ordinate and lead morning huddles, leadership meetings, team meetings including 1:1 coaching conferences
3. Ensure all team members perform their role in line with practice core values, policies, procedures and relevant position descriptions
4. Supervise recruitment, on-boarding and on-going training & support
5. Ensure practice is efficiently and adequately staffed

## AS MEASURED BY:

KPI	Standard
Adequately staffed every day	100%
Morning huddles conducted	100%
Start & End of Day checklist completed by all	100%
Monthly leadership meetings conducted	1 per month
Monthly 1:1 check-ins conducted	1 per staff
Quarterly coaching conferences conducted	1 per staff
Annual meetings conducted	1 per team

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Staff rostering using production units	100%
Leave policies adhered to when approving leave	100%
Review & Sign-off on start and end of day checklists	Once per day
Daily, Monthly, Quarterly team meeting rhythms actioned	100%
Book 1:1 monthly check-ins with all team members	100%
Book quarterly coaching conferences with all team members	100%

# PRACTICE MANAGER SCORECARD - FINANCE

## OBJECTIVES:

1. Accurate and timely financial reporting to update business owner
2. Accurately maintain and interpret case tracking data
3. Achieve Revenue, EBOC targets
4. Manage expenses within budgets
5. Manage accounts receivable and accounts payable

## AS MEASURED BY:

KPI	Standard
Revenue Target (Monthly)	\$xx00
EBOC Target	\$xx00
Consumables % (excluding implants)	5-7%
Wages % (Non-Clinical)	15-18%
Lab %	10 - 12 %
Marketing %	1-2 %
Case Conversion %	>80%

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Appointment Book structured with pre-blocks	100%
Stand-by list used to fill-in cancellations	95%
In-complete Tx's, Cancellations & FTA followed-up	95%
All accounts receivable collected	95%
Account terms utilized for accounts payable	100%
Staff rostering using production units	95%
Tracking spreadsheets updated	100%
Case-tracking done	100%



# PRACTICE MANAGER SCORECARD - COMPLIANCE

## OBJECTIVES:

1. Ensure practice standards are met under all relevant external standards and authorities
2. Ensure compliance with all quality frameworks
3. Ensure currency of all employment and contractor records including contracts, registrations, licenses etc

## AS MEASURED BY:

KPI	Standard
All clinician records up to date (PI, AHPRA registrations, contracts, leave, allergy and immunization etc)	100%
All staff records up to date (contracts, leave, coaching conferences, allergy and immunization registers etc)	100%
All patient records up to date	100%
Radiation license current, and equipment serviced and maintained	100%
Electrical equipment tested and tagged	100%
Emergency equipment serviced and maintained	100%
Security equipment serviced and maintained	100%
Staff trained on infection control and handling emergencies	100%

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Clinician records reviewed and updated	twice per year
All staff records reviewed and updated	twice per year
Patient records checked for compliance	once per month
Radiation equipment register reviewed and updated	once per month
Electrical equipment tested and tagged	twice per year
Emergency & Security equipment serviced and maintained	twice per year
Emergency kit register reviewed and updated	once per month
Infection control and handling emergencies training organised	once per year

# PRACTICE MANAGER SCORECARD - EQUIPMENT MAINTENANCE

## OBJECTIVES:

1. Ensure all practice equipment is functioning optimally
2. Ensure all practice equipment is serviced in a timely manner
3. Update and Monitor equipment maintenance log with data on purchase date, next service dates, errors, technician contact details and actions taken etc

## AS MEASURED BY:

KPI	Standard
All equipment serviced in a timely manner	100%
Equipment maintenance log up to date	100%
All equipment errors resolved within 24 hours	100%
Equipment maintenance within budget	\$XX00

## AND ACHIEVED BY THESE CRITICAL DRIVERS (activities):

Critical Driver (Activity)	Standard
Service dates recorded and next service booked in	100%
All staff trained on updating equipment log	100%
Record SOP's for common resolvable errors	100%
Daily, weekly, monthly maintenance tasks actioned	100%
Business Owner approval for equipment maintenance over \$xx00	100%

## NOTES

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