

The Dental Practice Review ©

The Self-Assessment Tool for Dentists

By The Dentist's Coach®!

As professionals and business owners, we dentists wear many hats! Not only do we see our clients/patients all day, but we juggle a ton of other responsibilities, requirements, rules, regulations, demands, expectations, and roles, in addition to keeping a watch on the entire spectrum of the business side of our practice.

This tool will help you assess what's working – and what's not – for you. It isn't your typical statistical analysis, sales strategies, or fancy practice management assessment. I won't bug you for numbers, ratios, or analyses. In fact, I'll ask you to judge for yourself – what your gut tells you – is true for you and your Practice.

You'll notice that a large part of this survey is about your biggest asset, your liability, your biggest overhead expense, and your biggest investment: your staff! You'll also notice that the last section is about you personally ... most always overlooked in typical practice assessments.

This assessment will help you clarify what aspects of your Practice are running smoothly, or where you might need help. Most importantly, it will help you define who you are and where you're going. It will give you a blueprint for your success!

As a coach, I understand that you know best what's for you and your Practice. Getting advice, analysis, and consultation is helpful and important, but ultimately you're left behind holding the ball – and you're the one that will have to carry it through. Your success depends on you! I know of no other way to get there faster than by working with a coach – one who is also a practicing dentist and who knows what you face.

To be able to clearly see the gap between where you and your practice are now, and where you want to be, is just the tool you need. Once you see that gap, you can more accurately determine what your next course of action will be, or where, how, if, and who to get help from. Working with a professional coach/consultant can help close that gap quickly, successfully, and expertly. You can often more than double the speed getting where you want to be using a coach/consultant, with less stress, fatigue, and cost than figuring it out on your own.

The major areas we will survey are:

- Employee Involvement**
- Employee Growth and Development**
- Family Support**
- Health and Safety**
- Patient Care**
- Practice Management**
- And Personally Speaking ...**

So, grab a pencil, find a comfortable chair in a quiet place, and enjoy a thoughtful look at your Practice and yourself. **When you're done, please contact me for your complimentary coaching session, included in your purchase of this survey. Together we can make your dream practice a reality!**

Circle the number of all statements that fully apply.

EMPLOYEE INVOLVEMENT

1. All team members are aligned with the Practice's vision and mission.
2. All team members have authority to act on a situation as they best see fit, within the legal and business protocols of the Practice, without reprimand or ridicule.
3. I communicate clear and candidly with my team members.
4. Team members communicate clear and candidly with each.
5. Each team member, at least annually, actively participates with me in a Performance Evaluation where they are able to safely voice their opinions.
6. Each team member, at least annually, actively participates in a Growth Conference that charts and challenges their future growth and potential.
7. I conduct an annual Compensation Review with each team member, privately.
8. I regularly publicly recognize individuals for outstanding performance during team meetings, and I recognize the entire team for work well done.
9. We have an enthusiastic team and enjoy each other's company immensely.
10. My management style is flexible and supportive.
11. Our work environment supports freedom of self-expression.
12. Each team member feels they can contribute toward the Practice's goals.
13. Each team member is adequately challenged in his/her position.
14. My team members truly feel a partner in the success of our Practice.
15. All team members share a voice in the decision-making process.
16. Each team member participates in planning and leading of team meetings, at least on a rotational basis.
17. We start each day with a Team Huddle/Morning Meeting, which has a regular agenda.
18. When conflict arises, we have emotionally healthy mechanisms in place to resolve any issues – completely.
19. We have completed assessments, such as a DiSC profile, to help us understand ourselves and each other better, and have used those opportunities for further growth and understanding as a team.
20. At least monthly meetings are held with each team member by the Office Manager and/or myself, to support the team members in their growth and development and work habits and efficiency.
21. We celebrate both formally and informally for our accomplishments as a team.

22. Team members are cross-trained, where possible.
23. All team members complete daily and monthly monitors for their positions.
24. There is not one weak link on the team.
25. Team members actively participate in the attraction and hiring of new team members.
26. Each team member is fully trained in all aspects of their position.
27. Everyone on my team participates in continuing education programs at least annually.
28. Team meetings have 100% attendance.
29. Team members help each other when needed.
30. There is very little absenteeism.
31. Team members actively participate and contribute to ways to increase efficiency and decrease overhead.
32. We work as a team to eliminate stress from all sources which is damaging and counter-productive in our practice and our personal well-being. We regularly discuss sources of stress at team meetings and develop ways to work together to eliminate them.
33. Team members are encouraged to pursue vocational and non-vocational interests.
34. I meet with each team member regularly to assist them discovering their talents and skills as may be currently untapped by the Practice.
35. I support our involvement as a team in community service projects and activities.
36. I am 100% accountable for my actions to myself and my team.
37. My team members are 100% accountable to me and to each other.
38. In times of personal or team crisis, I have professional contacts able to assist us.
39. We at least annually employ a coach or a consultant to evaluate our productivity and to assist us with our goal planning.
40. We openly express gratitude for each other every day.
41. We are 100% gossip-free.
42. Thank you notes and letters from our patients are openly shared with all team members.

EMPLOYEE GROWTH AND DEVELOPMENT

43. I provide regular training programs for all team members on the procedures and services I offer.
44. My team members are monetarily rewarded very well.
45. We have a Vision Statement that is read aloud once each week in a team meeting.

46. I am personally committed to my own personal and professional growth, and work with a coach, counselor, or consultant on a regular basis.
47. I support employee professional counseling programs for team members as needed.
48. We work together to eliminate all obstacles to each team member's optimal job performance.
49. The necessary equipment, knowledge, skills, and training is provided to each team member for them to do their job very well. Feedback is solicited from each team member in this area.
50. All team members participate in the promotion and improving the image of the Practice.
51. Team members are recognized for professional and personal accomplishments from outside the workplace.
52. Each team member is supported unequivocally in their pursuit of their personal success.
53. I support any team member's access to a range of psychological services as the team member may desire, not just traditional substance abuse programs.
54. I know and recognize signs of depression, and can make the appropriate referrals, if needed, for my team member's health and well-being, with their permission.

FAMILY SUPPORT

55. I have policies and practices that support work-family balance issues, such as infant and elder care, school-aged child care. My Practice could be viewed as "family-friendly" for potential and current team members.
56. I support and encourage activities that support my team member's family unit and emotional health.
57. The Practice has provisions for team members which must take time off for personal and family illness and other such matters.
58. I personally respond, when appropriate, to my team members' family needs in times of crisis.

HEALTH AND SAFETY

59. I place a priority of the health and safety of my employees.
60. I follow the letter of every OSHA, CDC, ADA, state, and federal guidelines and recommendations for a safe workplace practices.
61. My office is clean, tidy, and uncluttered.
62. We follow strict infection control procedures for the health and welfare of our patients and each other.
63. I employ an OSHA or Health and Safety consultant to review our infection control practices at least annually.
64. We have a Health and Safety Officer for our Practice who keeps mandated OSHA records on all Practice personnel.

65. I lead semi-annual medical emergency training sessions for all team members.
66. We have a comprehensive system of handling office medical emergencies utilizing the team approach. Every team member knows their role and can fill in for absent team members if necessary.
67. I have all the necessary equipment and supplies to handle in-office medical emergencies.
68. I keep adequate first aid supplies on hand for minor accidents in the office.
69. Hepatitis B vaccinations and TB testing is provided to all team members free of charge.
70. We have an Office Policy Manual which, among many other things, provided policies and procedures for possible sexual harassment protection.
71. Each team member completes CPR certification at least bi-annually or as required by your state.
72. Proper and effective personal protective clothing and equipment is provided for all team members.
73. There is a written maintenance schedule and log for all equipment in my office to be maintained in peak condition. Worn out and faulty equipment is replaced immediately.

PATIENT CARE

74. I personally wear magnification that enables me to complete the procedures I provide with greater precision.
75. I provide our hygienist(s) with appropriate magnification to do her job with greater precision, also.
76. We stay on schedule 100% of the time, except in an unusual crisis not due to poor planning or proper communication and diagnosis.
77. We treat each patient with respect, courtesy, and dignity, just as how we would prefer to be treated.
78. I am sensitive to, aware of, and openly communicate with my patients about their fear, and take steps necessary to make their office visit as comfortable as possible.
79. I quickly and effectively refer patients to specialists or other practitioners for any and all procedures I cannot easily and competently help, or who bring out the worst in me.
80. I do not provide services outside my area of expertise, ability, or legal parameters.
81. I work closely with a dental laboratory, providing them with thorough records, information, and feedback, to be able to obtain the best result possible, regardless of cost.
82. I communicate clearly and effectively with my patients. I regularly solicit their feedback on my ability to communicate with and relate to them. I always inform before I perform.
83. All patients keep their scheduled appointments.
84. Patients complete at least 80% of recommended treatment and 100% of necessary treatment.

85. I use only the safest and most effective materials available; I do not take risks which may endanger my patients.
86. We are 100% committed to our patients becoming as healthy as they want to become.
87. All patients receive a written treatment plan, complete with cost estimates.
88. I do not perform unnecessary work, and I am completely honest and up front about all prognoses and treatment fees.
89. We contact all patients after surgical or extensive treatment before leaving for the day or that evening, to check on the comfort and welfare, and to address any questions which may have come up.
90. We have neatly printed, thoroughly written, professional home care instructions, protocols, and treatment information for all the procedures we provide.
91. We engage our patients fully in the treatment planning process, engaging them in dialogue to determine their needs, wishes, and goals, and incorporating that into a mutually agreeable treatment plan.
92. We provide blood pressure and pulse screenings for each patient at each appointment.
93. We update each patient's medical history and medication usage, both prescription and herbal, at each appointment.
94. Patients regularly comment on their experience of comfort and feeling of well-being in our office.
95. Most of our patients come from word-of-mouth from satisfied patients.

PRACTICE MANAGEMENT

96. We are very organized, and patients comment regularly on our organization and efficiency.
97. We utilize the best technologies and equipment for our technical and business practices.
98. I maintain a triple check-and-balance system for monitoring collections and deposits.
99. I employ a CPA to complete the Practice's annual tax return and to review monthly Profit and Loss and Balance Statements.
100. I receive Monthly Profit and Loss and Balance Statements no later than the 5th of the following month from my Office Manager, bookkeeper, or CPA.
101. I have a healthy relationship with my banker.
102. All bills are paid on time or in advance, including payroll, property, excise, and income taxes.
103. I keep a cash reserve in the Practice for unplanned expenses.
104. I keep a safety deposit box at a bank for safekeeping of important records.
105. My office is properly secured whenever we are out of the office.

106. I maintain daily computer back-ups of all patient and financial information, which are taken off-site each day for safe-keeping. Monthly and yearly back-ups are placed in our safety deposit box.
107. All team member and financial records are kept in strict accordance with all federal and state labor and tax laws.
108. I have comprehensive business and professional liability insurance policies.
109. My Practice and I attend annual risk management courses, and practice solid risk management practices.
110. I have Business Overhead Insurance in the event of my disability.
111. My Practice is organized to the point that I could make it for sale within a few months.
112. We collect greater than 95% of collectable dollars. (Does not include insurance allowances, if your practice is not 100% fee-for-service.)
113. I have a solid, written, diversified financial plan for myself and my practice, and employ a certified financial advisor.
114. My Office Policy Manual is up-to-date and compliant with all my state and federal labor law guidelines. If needed, it has been reviewed by a labor attorney in my state for accuracy.
115. A copy of the Office Policy Manual has been given to and read by all team members.
116. Monthly Practice monitors are compiled for the Practice, and then reviewed by myself and the Office Manager, and then with the team by the 10th of each following month.
117. We regularly communicate with our patients about our services, accomplishments, and other newsworthy items through a Practice newsletter or other similar method.
118. We conduct Patient Satisfaction Surveys at least annually, and use these surveys in our team meetings to improve what we do.
119. The telephone is answered before the third ring every time.
120. Patients of record have a way to contact me outside of normal Practice hours for urgencies or emergencies. I respond appropriately and timely.
121. We regularly contact patients who are past due to preventive care and who have not completed recommended care, per their request and approval.
122. Our charts are regularly purged of inactive patients, who are then contacted, then either reactivated or placed in an inactive chart storage area.
123. Our patients know all of the services we offer.
124. We pre-block our schedule for all types of care, and reserve several times each week for new patients.
125. We do not reschedule appointments due to our poor planning or mistakes unless absolutely necessary due to emergencies or disasters.
126. We have a complete system of business cards, brochures, stationary, and note cards.

- 127. We call or write thank you notes for each patient referral.
- 128. We routinely thank our patients for the opportunity to be their dental services provider.
- 129. We offer outside financing options for patients who request it.
- 130. My dental office in its entirety (including my office) is neat, clean, organized, efficient, professional, and comfortable.
- 131. Our office is handicap-accessible.
- 132. Each team member has a signed, written employment agreement.
- 133. Team members are paid well, and an attractive benefit package is available, including a retirement and/or profit-sharing plan.
- 134. Either I or my Office Manager keeps a complete and updated Employee Personnel file for each team member.
- 135. We have a written employing hiring method, which incorporates by telephone and personal interviewing, reference checks, written assessments, and team participation.
- 136. There are written job descriptions and responsibilities for each position in the Practice, co-developed with the Office Manager, team member, and myself. These descriptions are reviewed at least annually.
- 137. We market and budget our Practice for a balance of internal and external marketing strategies.

AND PERSONALLY SPEAKING ...

- 138. I live my life according to my heartfelt values, and I regularly get my needs met in a healthy way.
- 139. I relate well with each team member, and I am an excellent listener.
- 140. I am a solid leader.
- 141. I take excellent care of myself, both physically and emotionally. I also get an annual physical exam and a bi-annual ophthalmologic exam.
- 142. I regularly solicit feedback from my employees about my personal effectiveness and communication skills.
- 143. I enjoy my work and my life immensely, and I am on a path to take me or keep me there.
- 144. I have healthy and solid personal relationships with my family and friends.
- 145. I have a will and an estate plan.
- 146. I am a person of my word; I live with complete integrity.
- 147. I have insurance in all areas of my work and personal life that are appropriate for me, including disability, life, personal liability, auto, and home insurances.
- 148. I have an active and healthy life outside of my Practice with varied activities and interests.

149. I am a lifelong student of dentistry and of life.

150. I am financially independent and/or actively pursuing it.

Congratulations! Just completing this survey means you are well on your way to continued practice success. Your awareness of these key areas and issues will allow you to begin to chart a course for you to develop the Practice of your dreams!

I encourage you to use this document with your team members as you see fit to develop strategies and plans, to open lines of communication, to gain insight and clarity about your workplace practices, and to achieve greater success and fulfillment than you thought possible.

I look forward to discussing your results during your complimentary coaching session. When you are ready, contact me toll-free 866-663-9903 or email me at drdeems@drdondeems.com.