The *Complete Care* Dental Team

West Coast District Dental Association

90\textsuperscript{th} Annual Meeting

February 2012

Presented By:

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Current Trends for the Complete Care Dental Team

1. ________________ performance.
2. ________________ service.
3. ________________ experience.
4. No ________________ on ________________.
5. ________________ possible ________________.

Professional Service from a Patient’s Point of View

The staff ________________ that they want to be at work in your practice.

Someone is ________________ available to answer questions.

The office is ________________.

The office is ________________ to find.

The staff is ________________ and knows the procedures performed by the dentist and hygienist.

The clinical and business office staff is ________________ dressed and look ________________.

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### Top 10 Shopping Dislikes

<table>
<thead>
<tr>
<th>Dislikes</th>
<th>Women / Men</th>
<th>Actual Women / Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pushy sales people</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Price (scans) differently than marked</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Can’t take things back if not satisfied</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Dirty stores</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>No one to help</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>No price on items</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Dirty restroom</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Long lines at checkout</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Advertised item not in stock</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
<tr>
<td>Rude staff</td>
<td>_____ / _____</td>
<td>_____ / _____</td>
</tr>
</tbody>
</table>

### 8 Top Characteristics of the Highest Rated Staff Members

1. ____________ me with a ________________.

2. Makes me ________________ at ________________.

3. Exhibits ________________.

4. Answers ________________ ________________ this current procedure.

5. Knows ________________ ________________.

6. ________________ the patient.

7. Makes the patient feel that ________________ will not stop.

8. Makes the patient feel ____________ were based on their ________________.
The Cycle of Complete Care

10 Steps to Start the Cycle

1. Know the ________________ of care for your practice.

2. ________________ this philosophy to the staff and each other.

3. ________________ performance ________________.

4. ________________ training needs.

5. ________________ regular ________________.

6. Make ‘em ________________ the process.

7. Utilize ________________ scheduling.

8. ________________ to gain treatment acceptance.

9. ________________ existing patients to ________________.

10. ________________ ________________ to what your results are telling you.
# Determine Your Practice Operating Overhead

Major Expenses (50%)  
+ General Expenses (10%)  
= Total Operating Overhead (60%)  

Total Collections (100%)  
- Total Operating Overhead (60%)  
= Operating Profit (40%)  

Operating Profit (40%)  
- Additional Expenses (Equipment, Practice, Student loans, etc.)  
  - New Equipment  
  - Facility Upgrades  
  - Doctor’s Expenses (CE, Insurance, etc.)  
  - Doctor’s Salary  
= Net Profit

## Major Expenses:

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Supplies</td>
<td>6.0%</td>
</tr>
<tr>
<td>Laboratory</td>
<td>10.0%</td>
</tr>
<tr>
<td>Employer Payroll Taxes</td>
<td>2.0%</td>
</tr>
<tr>
<td>Practice Promotion</td>
<td>2.0%</td>
</tr>
<tr>
<td>Occupancy</td>
<td>7.0%</td>
</tr>
<tr>
<td>Staff &amp; RDH Salary</td>
<td>20.0%</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>3.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>50.0%</strong></td>
</tr>
</tbody>
</table>

## General Expenses:

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting and Legal</td>
<td></td>
</tr>
<tr>
<td>Bookkeeping</td>
<td></td>
</tr>
<tr>
<td>Employee Recruitment</td>
<td></td>
</tr>
<tr>
<td>Insurance, Malpractice</td>
<td></td>
</tr>
<tr>
<td>Laundry and Linen Service</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td></td>
</tr>
<tr>
<td>Postage</td>
<td></td>
</tr>
<tr>
<td>Taxes, Personal Property</td>
<td></td>
</tr>
<tr>
<td>Telephone /Internet</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>10.0%</strong></td>
</tr>
</tbody>
</table>

## Additional Expenses:

- Associate Salary
- Depreciation
- New Equipment Purchases
- Interest Payments
- Loan Payments
- Equipment Rent/Lease
- Upgrades to facility

## Doctor’s Expenses:

- Continuing Education
- Insurance: Life/Health/Disability
- Retirement
- Professional Travel
- Taxes
- Doctor’s Salary

## Notes:

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

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Determine Your Personal Operating Overhead

Along with understanding the practice overhead you must also determine your personal overhead in order to determine how much the practice must produce to support your lifestyle. Create a yearly budget. Determine how much you must spend each year in each of the following categories to satisfy your goals for a happy lifestyle. Start with the minimum amount necessary.

<table>
<thead>
<tr>
<th>Basic Lifestyle Expenses</th>
<th>Discretionary Lifestyle Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing $</td>
<td>Education $</td>
</tr>
<tr>
<td>Food $</td>
<td>Entertainment $</td>
</tr>
<tr>
<td>Clothes $</td>
<td>Vacations $</td>
</tr>
<tr>
<td>Transportation $</td>
<td>Hobbies $</td>
</tr>
<tr>
<td>Household expenses $</td>
<td>Gifts $</td>
</tr>
<tr>
<td>Recreation $</td>
<td>New Car/Boat $</td>
</tr>
<tr>
<td>Health/Life/Disability $</td>
<td>Vacation Home $</td>
</tr>
<tr>
<td>Savings $</td>
<td></td>
</tr>
<tr>
<td>Retirement $</td>
<td></td>
</tr>
</tbody>
</table>

Subtotal $                        
Income taxes $                    
Total $                           

Managing Your Time

How much would it cost you in time to produce $100,000 in annual income?

If production per hour is $300:

@ 70% overhead = $90.00 per hour and would take ____________ hours or ____________ days
@ 65% overhead = $105.00 per hour and would take ____________ hours or ____________ days
@ 60% overhead = $120.00 per hour and would take ____________ hours or ____________ days

If production per hour is $375:

@ 70% overhead = $112.50 per hour and would take ____________ hours or ____________ days
@ 65% overhead = $131.50 per hour and would take ____________ hours or ____________ days
@ 60% overhead = $150.00 per hour and would take ____________ hours or ____________ days

NOTES: __________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
Estimating Growth Potential

What is your current stage of business development?

<table>
<thead>
<tr>
<th>Years</th>
<th>Percentage</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5</td>
<td>50% - 100%</td>
<td>30-34</td>
</tr>
<tr>
<td>6-15</td>
<td>20% - 25%</td>
<td>35-44</td>
</tr>
<tr>
<td>16-30</td>
<td>10% - 15%</td>
<td>45-59</td>
</tr>
<tr>
<td>31-35</td>
<td>7% - 10%</td>
<td>60-65</td>
</tr>
</tbody>
</table>

Embryonic | Growth | Mature | Transition

Age 30 | Age 35 | Age 45 | Age 60 | Age 65

5 years | 10 years | 15 years | 5 years

Know Your Numbers

Daily Production:
- Doctor
- Hygienist

Hourly Production:
- Doctor
- Hygienist

Adjustments:
- Bad Debt
- Financing
- Insurance
- Cash Discounts
- Courtesies

Accounts Receivable:
- Ratio
- Aging

Collections:
- Payment Plans
- Time of Service

New Patients:
- Internal
- External

Case Acceptance:
- Tx Diagnosed
- Tx Accepted
- New Pt. Value

Hygiene Recall:
- Due
- Seen
- Pre-appointed
- Not appointed

Broken Appointments:
- Doctor
- Hygienist

Reserves:

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LARRY M. GUZZARDO

Larry began his 24-year career as a training specialist where he delivered in-house training programs such as active listening, customer service, stress management, and career development. Since turning to full-time dental consulting 18 years ago, he has focused his talents and experience exclusively on dental practice management, business systems, and leadership development. He conducts in-office practice management consultations that are designed to enhance trust, create organization, increase profits, and develop patient relationships that last.

Larry has co-authored two books, “Powerful Practice” and “Getting Things Done”. He has also presented numerous workshops including, “Winning Patient Acceptance,” “Business Communication Systems,” and “The Leadership Challenge.”

Larry has spoken to professionals across the United States on Practice Management, having received the Speaker’s Appreciation Award from several organizations, including the American Academy of Cosmetic Dentistry, Florida National Dental Congress, and the National University of Mexico, as well as a Certificate of Appreciation from the Georgia Dental Association and has earned a Certificate of Recognition from the American Dental Association. The Hinman Dental Society has also presented Larry with Certificates of Appreciation for his table clinic presentations.

He also serves as a member of the visiting faculty at the Dawson Academy where he teaches patient communication and practice management techniques. Larry is certified to administer the DISC Personality Profile and is certified as a Standard Operating Procedures (SOP’s) Consultant. He is a member and past secretary of the Academy of Dental Management Consultants and has contributed articles for various publications. Larry actively promotes adult literacy in the community by volunteering to serve on the Board of Directors for Project READ as chairman of the program development committee.