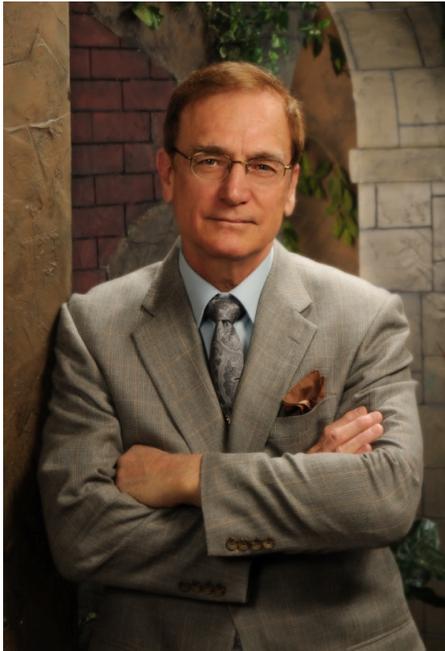


# about Dean C. Bellavia, Ph.D., M.S.



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[www.DeanBellavia.com](http://www.DeanBellavia.com)

For many decades, Dr. Bellavia has worked with hundreds of new and established practices and with thousands of team members to design most of the state-of-the-art orthodontic systems used today.

Dean has published four management books on orthodontics and two books on personality, has written scores of articles on practice management, has lectured to thousands of orthodontic professionals, and provides you with semi-monthly “Management Pearls” at [www.DeanBellavia.com](http://www.DeanBellavia.com)

Dean has spent the last 4 years developing **A~D~D~I~C~T**...a complete, systematic approach to practice management and do it yourself practice optimization.



# What is Orthodontic Practice Management?

Management is composed of **3 Entities:**

- 1) Your well-chosen, well-organized, and well-trained **Team**...with an *attitude* of responsibility for their assigned tasks.



- 2) Your management **Systems** that your team works with...without systems (organized procedures) you have chaos.

#### Team Training Programs

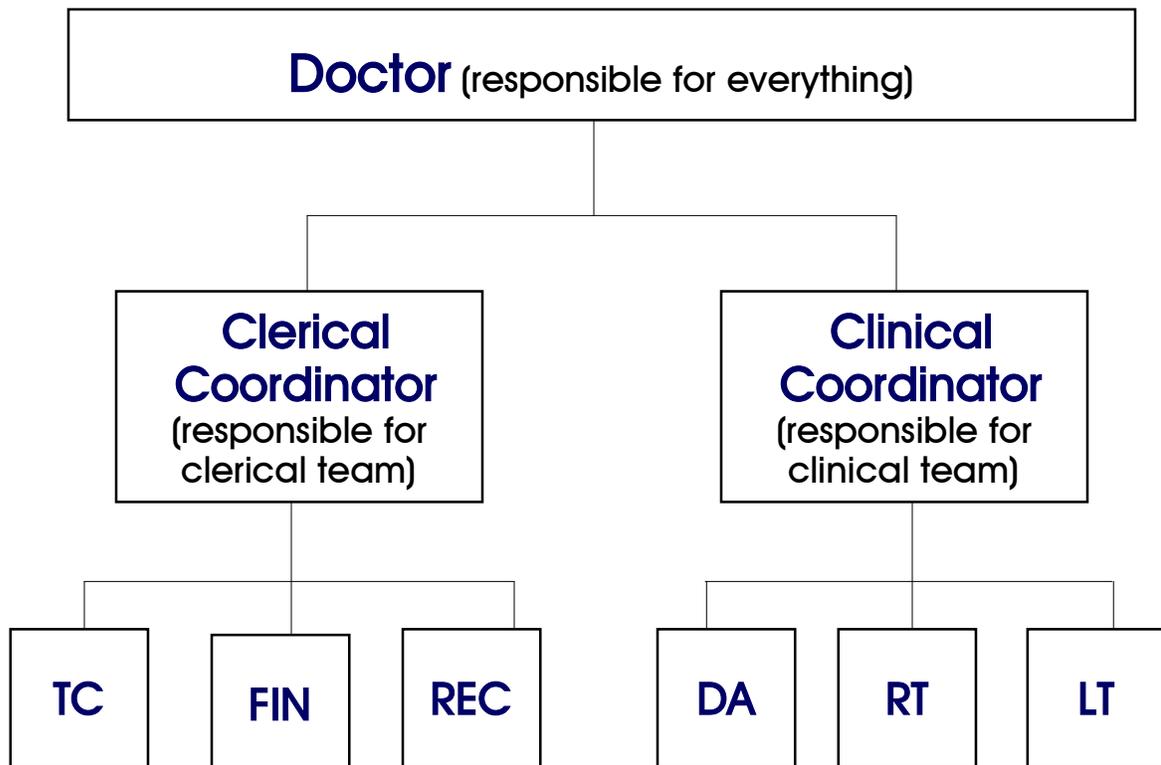
ORTHO & OSHA Orientation  
TC Program  
Receptionist Program  
Financial Program  
Chairside DA Program  
Records Tech Program  
Patient Trainer Program

- 3) A **Systematic Approach** to installing your systems; referred to as **A~D~D~I~C~T**



# 1) Your Management **TEAM**

With designated people  
**responsible** for their systems.



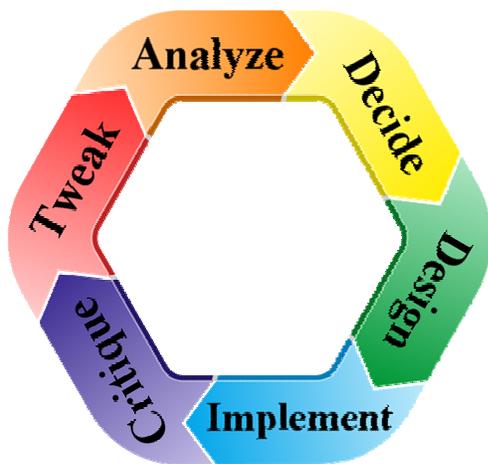
## 2) Your Management **Systems**

There are **9 major systems**  
(at varying levels of effectiveness)  
that all orthodontists use to run their practices:

- 1) **Team Organization:** staffing position levels & delegation
- 2) **Team Hiring:** seeking, testing, interviewing, selecting
- 3) **New Pt. Experience (TC) Program:** consults, fees, follow-up, OBS, communications
- 4) **Team Training:** legal/ortho orientations, training sequences, demonstrations
- 5) **Team Scheduling:** stats, Tx Mech, all appointments, calculate, design, control
- 6) **Setting & Attaining Goals:** set goals, monitor progress, make changes
- 7) **Tx Quality Control:** Tx Mechanotherapy, Periodic Pt. Reviews and Pt. Training
- 8) **Partnership or Association:** partner/associate types, compatibility, shared management
- 9) **Financial Control:** charges, collections & payables

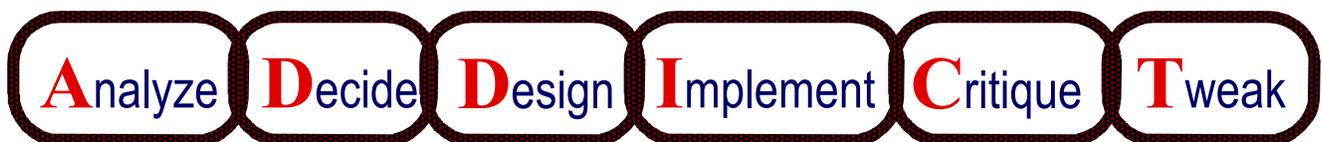
There are also **45 sub-systems** that support the 9 major systems (listed below).

### 3) A **Systematic Approach** to Installing Your Systems called...



**A~D~D~I~C~T**

...a sequence or  
chain of logical  
steps



...but the chain is only as strong as its  
weakest link...

you need to give *every* step its due.



## How do you use **A~D~D~I~C~T** to Optimize Your *Entire Practice*?

**Not sure where to start?** All practice systems are interrelated and need to be chronologically implemented or you're **doomed to failure**.

**Step-1:** Before you do anything...analyze your practice's needs

**Step-2:** Moving into a **New Office**?...*move in* before implementing **A~D~D~I~C~T**.

**Step-3:** Installing a **New Computer**?...*install it* before implementing **A~D~D~I~C~T**.

**Step-4** Are you **Adequately staffed**? If so, great, if not, **A~D~D~I~C~T** your team organization and hiring—your systems are embedded in your team...no team...no systems.

**Step-5:** Are your **TC's conversion rates** and marketing adequate? If so, great, if not, **A~D~D~I~C~T** your TC programs next.

**Step-6:** Is your **Team Fully Trained**? If so, great, if not, **A~D~D~I~C~T** your training next.

**Step-7:** Once Step-1 through Step-6 are accounted for, you can **A~D~D~I~C~T** your **Scheduling** systems.

**Step-8:** If you are considering a **Partner or Associate**, this is when you should **A~D~D~I~C~T** it.



To design your **9 major systems** you will need either your own experiences, consultants, reference books or Management Kits.

To design your **45 sub-systems** all you need is “Dr. Bellavia’s Management Pearls”. All of these management systems are listed below.

### **Major System-1:**

#### **Your Team Organization System**

(to have efficient team utilization)

Determine your staffing needs (numbers of staff)

### **The 8 Sub-Systems of Team Organization:**

#### **Automate your Team Management**

(to set realistic team position responsibilities)

#### **Create a Balanced Practice Personality**

(to better interact with your team and patients)

#### **Create Team Leadership**

(to better control your team’s tasks)

#### **Vaccinate yourself against the “Dismoral Virus”**

(to avoid team mutiny)

#### **Vaccinate yourself against the “Embezzlement Virus”**

(to avoid loss)

#### **Play the “Relationship Game”**

(for more positive team relationships)

#### **Use “Mind Set”**

(for more positive team relationship)

## **Major System-2:**

### **Your Team Hiring System**

(to hire the right person the first time)

First determine your staffing needs (Team Organization)

Include an Effective Hiring Program  
(and test for the best)

## **The 4 Sub-Systems of Team Hiring:**

### **Don't become liable with new applicants**

(to protect you and them)

### **Negotiate Salaries & Benefits**

(for an understanding between of what's to come)

### **Create an Office Policy Manual**

(so that she knows the rules and agrees to them)

### **Know when and how to terminate/replace staff**

(to keep your team harmonious and effective)

## **Major System-3:**

### **New Pt. Experience TC Program**

(for more starts, referrals and cooperation)

Evaluate/Improve your TC's strengths and weaknesses

Design an effective Exam/Consult room

## **The 9 Sub-Systems that Support your TC Program:**

### **Learn how to Effectively Sell your cases**

(for more starts and financial control)

### **Create a Fees & Financial Arrangement Schedule**

(for more starts and financial control)

### **Make your Fees More Acceptable**

(for more starts and financial control)

### **Resolve the Records Fee Dilemma**

(for more starts and financial control)

### **Create your Ongoing Communications System**

(for more referrals and patient cooperation)

### **Controlling your Will-Call-Back patients**

(for more starts for the exams you have)

### **Create your OBS & Ph-I Retn Recall Control System**

(for OBS and Ph-II Starts)

### **Create your Transfer Patient Control Philosophy**

(for better financial & Tx quality control)

### **Create your Run-On Patient Control**

(to resolve the cases that are out of control)

## **Major System-4:**

### **Your Team Training System**

(for fast, effective comprehensive training)

Include a Legal Orientation

(to keep everything legal and safe)

Include an Orthodontic Orientation

(to become familiar with *your* orthodontics)

Include Effective Training Sequences for all positions

(to become familiar with *your* orthodontics)

Include Effective OSHA & HIPAA PROGRAMS

(to be legally compliant and protect you and your patients)

## **The 4 Sub-Systems of Team Training:**

**Don't Lose those great new hires**

(train effective and *timely*)

**Evaluate your team member's abilities**

(to determine where they need improvement)

**Protect your practice from OSHA**

(to avoid costly penalties)

**Protect your patients with HIPAA**

(to safeguard patient privacy)

## **Major System-5:**

### **Your Team Scheduling System**

(to optimize team utilization and patient flow)

First determine your Practice Statistics

(to determine the treatment you produce each day)

Next determine your Tx Mechanotherapy

(the services you give)

Next determine your Tx Appointment sequences

(the appointments you use to provide those services)

Next determine your staffing & appointment numbers

(Team Organization)

Next design your schedule

(to fit your daily needs)

## **The 4 Sub-Systems of Team Scheduling:**

### **Use a Rotation Schedule & Vertical Calendar**

(to maximize your patient availability)

### **Control your Schedule System**

(when patients mess up your perfect day)

### **Optimize your Daily Patient Flow**

(because you need more than an ideal schedule)

### **Get the Doctor Into & Out of the Exam on time**

(to stay on schedule)

## **Major System-6:**

### **Your Goal-Attaining & Reporting System**

(to Set, monitor and Attain your realistic goals)

Set Realistic Goals

Create your Monthly Statistics & Reporting system

Create change to better attain your goals

## **The 6 Sub-Systems of Reporting and Goal Attaining:**

### **Create your Marketing Programs**

(to reach your patient market and let them know you exist)

### **Create a Website that Works**

(to make those who reach it *want* to have treatment by you)

### **Consider Alternative Tx Mechanotherapies**

(Invisalign, etc., to broaden your *adult* market)

### **Create better PCD Referral Control**

(to encourage referring dentists to send more patients)

### **Create a Team Bonus System**

(a win-win system to inspire your team to grow your practice)

### **Create Exceptional Patient Visits**

(that stimulate patient referrals)

## **Major System-7:**

### **Your Tx Quality Control System**

(to finish your cases well and on time)

## **The 5 Sub-Systems of Tx Quality Control:**

### **Create/improve an Effective Tx Mechanotherapy**

(to effectively treat all of you patient's malocclusions)

### **Completing your Run-on Cases**

(to keep your Estimated Completion Date)

### **Create your Periodic Pt. Review System**

(to keep your Estimated Completion Date)

### **Create your Pt. Training & Cooperation System**

(for better patient cooperation)

### **Create SOS, and Failures/Cancellation Systems**

(for a smoother schedule and faster treatment times)

## **Major System-8:**

### **Your Partner/Associate System**

(to effectively share practice responsibilities )

Choose a compatible Partner or Associate  
(using a system that covers all of the bases)

## **The 1 Sub-System for Partners & Associates:**

### **Combining Ortho and Pedo Practices**

(for an understanding between of what's to come)

## **Major System-9:**

### **Your Financial Control Systems**

(to effectively collect and pay for the services you provide)

Include an Effective Charging system Legal Orientation  
(to charge for *all* that you provide)

Include an Effective Collections System  
(to collect what you charged for)

Include an Effective Payables/Payroll System  
(to only pay for what you received)

Include an Effective Computer System  
(that does not give you more problems than it is worth)

## **The 4 Sub-Systems of Financial Control:**

### **Create your Daily Cash Control system**

(to make sure what you collect goes in the bank)

### **Create your Past Due Control system**

(to make sure you collect all that is due you)

### **Create you're A.P & Payroll system**

(to account for the expense aspect of business)

### **Create you're Purchasing (supplies) Control system**

(to lessen waste and expense)