



Dr. Dean C. Bellavia's A~D~D~I~C~T your Goal Attaining Systems

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A~D~D~I~C~T your Goal-Attaining Systems (to set and attain your monthly goals)

1. Create your systems to Set and Report on your Goals.....for more realistic goals that you *can* attain
2. Create your Marketing Systems to reach your patient market and let them know you exist
3. (Re-)Create a Website that Works to make those who reach it *want* to have treatment by you
4. Create better PCD Referral Control..... to encourage referring dentists to send you more patients
5. Consider Alternative Tx Mechanotherapies (Invisalign, Lingual)to broaden your *adult* market
6. Create your Team Bonus Systema win-win system to inspire your team to help grow your practice

Create your Goal-Attaining & Reporting Systems

System's Components in your Goal-Attaining & Reporting Management Kit

- ☐ "Setting Realistic Goals" (see the Setting Realistic Goals Management Pearl on page 7 below)
- ☐ "Monthly Budget Expense Categories" (found in Appendix-B of Goal-Attaining Kit)
- ☐ "TC Monthly Statistics" (found in Appendix-C of Goal-Attaining Kit)
- ☐ "Monthly Financial Statistics" (found in Appendix-D of Goal-Attaining Kit)
- ☐ "Monthly Visit Statistics" (found in Appendix-E of Goal-Attaining Kit)
- ☐ Excel Spreadsheets for monthly Budget and Super Reports (in your Reporting Kit files)

System's Responsible Persons (to create & monitor the reporting system): Doctor &/or Financial Coordinator
(name)_____

Realistic Analysis, Decision & Design Time Frame: 1-2 weeks to watch kit video (or read "The Other Book...", set realistic goals for the reporting system and complete the Reporting System design

Realistic Implementation Time Frame: 2-3 weeks to collect year to date statistics and enter them into the reports

Realistic Critique Time Frame: 1 week at the end of each month to determine whether goals are being attained

Realistic Tweaking Time Frame: 2-3 weeks to modify goals and/or implement new programs to attain those goals

Analyze, Decide & Design: (all done simultaneously)

- ☐ Decide who will be best to create and control the system
- ☐ Watch Goal-Attaining kit video using the video design workbook (or read "The Other Book...on orthodontics" & CD files) to decide on which aspects of the system are to be used (i.e., statistics, forms, budget categories, etc.)
- ☐ Which statistics are collected on paper and which electronically (Excel spreadsheets)
- ☐ Who will collect the various statistics monthly to give to the person responsible for the monthly reports

Implement:

- ☐ Choose a starting date, fill in year-to-date report statistics and start generating monthly reports

Critique:

- ☐ Which goals are not being attained and why and whether the goals should be modified or not

Tweak:

- ☐ Change goals and/or implement/change programs (TC, marketing, etc.) to better attain those goals

Check off the boxes of the steps you have completed



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Create Your Marketing Systems (to reach your patient market and let them know you exist)

System's Components in Goal-Attaining & Reporting Kit:

- ☐ Marketing your Practice (see the Practice Marketing Management Pearl on page 7 below)
- ☐ INTERNAL Marketing Programs (found in Appendix-G of Goal-Attaining Kit)
- ☐ Critiquing your Marketing Programs (found in Appendix-M of Goal-Attaining Kit)

System's Responsible Persons: TC and others (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic **A**nalysis Time Frame: 1-2 weeks to determine your goals and possible programs needed to attain them (see above)

Realistic **D**ecision Time Frame: 1-4 months for DR & TC? to set up **each** marketing program (DDS, Patient, Internet, etc.)

Realistic **D**esign Time Frame: 3-6 weeks to design **each** program

Realistic **I**mplementation Time Frame: 1-2 weeks to set the program in motion

Realistic **C**ritique and **T**weak Time Frame: after 3-6 months, determine the effectiveness of the program and make the necessary changes

Analyze:

- ☐ Whether you are getting as many DDS referrals as you should: which DDS's you may get more out of and which DDS's you can *start* getting referrals from
- ☐ Whether you are getting as many patient referrals as you should
- ☐ In general about 50% of your patients should be DDS referrals and 50% patient/other referrals. In general, if you are a newer practice there are many more DDS referrals and if you are an older practice there are many more patient referrals. If you are a premier Invisalign provider (about 100/year) your braces referrals will be down and the Invisalign website will be sending you most of those referrals.

Decide:

- ☐ Which marketing programs to use, in what order, and who will be in charge of *each* program. There are many programs to choose from and a good place to start are your INTERNAL marketing programs (APP-G) and then move on to other programs.
- ☐ Who will be responsible for each marketing program (many are TC-related, but others can be handled by ant team member, especially if you have one specifically hired to do marketing)?

Design:

- ☐ Your internal marketing programs using Appendix-G as a guide (also refer to APP-K)
- ☐ Other marketing programs using Appendix-F as a guide

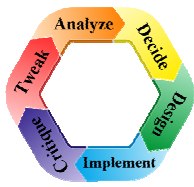
Implement:

- ☐ Choose a starting date to implement each program

Critique and Tweak:

- ☐ For a general critique use Appendix-M: Critiquing your Marketing Programs after they are well under way
- ☐ In general, a marketing program makes them aware of you, after that you must sell them on you using your TC programs
- ☐ Critique what might have gone wrong with your programs (staffing, attitude, procedures, etc.), fix it and implement and critique the changes.

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Create a Website that Works (to make those who reach it *want* to have treatment by you)

System's Components:

- ☐ Create an Orthodontic Website (see the Orthodontic Websites that Work Management Pearl on page 7 below)

System's Responsible Persons: X (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic **A**nalysis Time Frame: 2 weeks to analyze your present website for improvement

Realistic **D**ecision Time Frame: 2 weeks for DR & responsible person to identify website areas to be improved

Realistic **D**esign Time Frame: 1-2 months to *redesign* non-ideal aspects of the website

Realistic **I**mplementation Time Frame: 1-2 months to write and publish the website "code" for the improvements

Realistic **C**ritique Time Frame: 3-6 months after the launch of the revised website to determine its effectiveness

Realistic **T**weaking Time Frame: 1-3 months to modify and re-code the website

Analyze:

- ☐ Whether you are getting positive or negative feedback from your website by asking new patients about it
- ☐ Whether your website is all about the patients—😊, or all about you—😞
- ☐ Whether your website is user friendly or difficult to navigate
- ☐ Whether your website is has all of the required positive elements and none of the negative

Decide:

- ☐ Whether to update your website or not and setting a timetable for it
- ☐ Who will be the person in charge of upgrading your website *design/content*
- ☐ Who will be the person in charge of upgrading your website *programming (writing code)*

Design:

- ☐ Redesign the pages that are all about you and make it all about them
- ☐ Add or remove any pages required and revamp the layouts if necessary

Implement:

- ☐ Choose a starting date to launch your revised website and publish it
- ☐ Notify your patients of your revised website if appropriate

Critique:

- ☐ Ask new patients if they used your revised website and what they thought of it.
- ☐ Have a "like" or "comment" on your website for visitors to it (but keep it confidential)
- ☐ What else goes wrong and why? _____

Tweak:

- ☐ Make any necessary changes in the website based on your critiques
- ☐ Re-publish the website with the changes.

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Create better PCD Referral Control (to encourage referring dentists to send more patients)

System's Components:

- ☐ Enhance your inter-practice referrals (see the Referral Based Practice Management Pearl on page 7 below)
- ☐ Critique your PCD Referral Control (found in Appendix-K of Goal-Attaining Kit)

System's Responsible Persons: TC (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic **A**nalysis Time Frame: 1-3 weeks to determine your DDS and other referral bases and review the programs

Realistic **D**ecision Time Frame: 1-2 weeks for DR & TC to decide which programs to use

Realistic **D**esign and **I**mplement Time Frame: 1-2 weeks (each) to design and implement each program in order

Realistic **C**ritique Time Frame: 1 week, 6 months after a program is implemented (for each program)

Realistic **T**weaking Time Frame: 1-2 weeks to modify and implement any program changes

Analyze:

- ☐ Whether you need new or revised your patient/family referral programs (see Appendix-I)
- ☐ Who are your good and poor PCD (family DDS) referrers

Decide:

- ☐ Which *basic* patient/family programs will be worked on 1st, 2nd, etc.
- ☐ Which PCD (Primary Care Dentist) will be worked on 1st, 2nd, etc.
- ☐ Which PCD programs will be utilized on 1st, 2nd, etc.

Design and Implement: (done simultaneously)

- ☐ The *basic* patient/family programs in order (one at a time)
- ☐ The PCD programs in order (one at a time) per DDS

Critique:

- ☐ Determine whether your patient/families are happier and sending you more referrals
- ☐ Determine whether your PCD's are sending you more referrals
- ☐ Use the Appendix-L "PCD Referral Preference System Critique" if implemented
- ☐ Which programs might need improvement and why? _____

Tweak:

- ☐ Your basic patient/family programs to make them happier with your services and send more referrals
- ☐ Or expand your PCD programs to make them refer more patients
- ☐ Clean up any of the problems noted in your critique above.

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Consider Alternative Tx Mechanotherapies (to broaden your adult market)

System's Components:

- ☐ Allow for Tx Mechanotherapies that Attract Adults (see the Plastic Aligners Management Pearl on page 7 below)

System's Responsible Persons: X (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic **A**nalysis Time Frame: 1-2 weeks to look into all aspects of the adult Tx mechanotherapies

Realistic **D**ecision Time Frame: 1-2 weeks for DR to decide which to implement if any

Realistic **D**esign, **I**mplement, **C**ritique and **T**weak Time Frame: 12-24 months to perfect that Tx mechanotherapy and decide to continue with it or not (this is done for EACH new Tx Mechanotherapy...done in order, not simultaneously)

Analyze:

- ☐ The positive and negative effects that plastic aligners will have on your growth and profitability
- ☐ The positive and negative effects that gold braces will have on your growth and profitability
- ☐ The positive and negative effects that ceramic braces will have on your growth and profitability

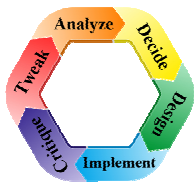
Decide, Design and Implement: (all done simultaneously)

- ☐ Which, if any, Tx mechanotherapy you will be defined (designed) and implemented FIRST
- ☐ Which, if any, Tx mechanotherapy you will be defined (designed) and implemented second, third, etc.
- ☐ Decide, design and Implement that Tx mechanotherapy starting with a few patients and increasing in numbers as you perfect the it.

Critique and Tweak: (done simultaneously)

- ☐ Determine what aspects of that Tx mechanotherapy are working for you and which aren't and make the necessary changes to perfect them
- ☐ Determine whether it is increasing your production and net and make the necessary changes to increase them or possibly abandon that Tx mechanotherapy
- ☐ What else goes wrong, why and what to do about it _____

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Create your Team Bonus System (a win-win system to inspire your team to help grow your practice)

System's Components:

- ☐ Start an Ideal Team Bonus Program (see the Ideal Team Bonus System Management Pearl on page 7 below)

System's Responsible Persons: Bookkeeper? (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic **A**nalysis Time Frame: 1-2 weeks to analyze your team attitude and net for a possible bonus

Realistic **D**ecision and **D**esign Time Frame: 1-2 weeks to determine what, if any, bonuses you will give

Realistic **I**mplementation Time Frame: 1-2 weeks to set the date to implement the program

Realistic **C**ritique and **T**weak Time Frame: 6-12 months to perfect or eliminate the program

Analyze:

- ☐ Whether your team has the right "attitude" to grow your practice
- ☐ How much of your net you can gamble on in bonuses to grow your practice
 - ☐ For every \$100,000 increase in gross, you will receive an \$80,000 increase in net if you don't have to increase your staffing
 - ☐ A typical bonus system should reward each team member about \$2,000/year if you grow
 - ☐ You can enter *last year's* production, collections and staff-related expenses into the Excel Bonus Spreadsheet and play with the \$/% and % staffing overhead to calculate what might work for you

Decide and Design: (done simultaneously)

- ☐ Whether your team will help you grow or not and whether to replace individuals standing in your way
- ☐ What the parameters (\$/% and % staffing overhead) will be for the system
- ☐ When to start implementing the system (in January or the current month)

Implement:

- ☐ Replace team members with a poor attitude
- ☐ Implement the bonus system and pay the bonuses monthly for one year if possible

Critique and Tweak: (done simultaneously)

- ☐ Determine whether the bonus program is growing your practice or not (after at least 6 months), comparing this year with the same period last year
- ☐ Make the changes in the program to better reward or less reward your team or drop the program
- ☐ What else is not working and why? _____

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Enhance your Goal-Attaining systems above with the following Management Pearls:
(Click on the links below.)

- ☐ Goal-Attaining: [Setting Realistic Goals:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=173&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=173&Itemid=766
- ☐ Goal-Attaining: [Marketing Your Practice:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=199:marketing-your-practice&Itemid=818)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=199:marketing-your-practice&Itemid=818
- ☐ Goal-Attaining: ["Orthodontic Websites that Work":](http://www.thebio-engineeringco.com/index.php?option=com_k2&view=item&id=168:orthodontic-websites-that-work&Itemid=818)
http://www.thebio-engineeringco.com/index.php?option=com_k2&view=item&id=168:orthodontic-websites-that-work&Itemid=818
- ☐ Goal-Attaining: [Referral-Based Practice:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=277&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=277&Itemid=766
- ☐ Goal-Attaining: [How Plastic Aligners May Increase your Net](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=172:how-much-can-invisible-aligners-increase-your-net&Itemid=818)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=172:how-much-can-invisible-aligners-increase-your-net&Itemid=818
- ☐ Goal-Attaining: [The Ideal Team Bonus System](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=171:resolving-the-bonuses-problem&Itemid=818)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=171:resolving-the-bonuses-problem&Itemid=818
- ☐ Goal-Attaining: [The "Insurance Acceptance Conundrum":](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=285&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=285&Itemid=766
- ☐ Goal-Attaining: [Starting the Most Exams Possible:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=264&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=264&Itemid=766
- ☐ Goal-Attaining: [Making Patient Visits more Exceptional:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=235&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=235&Itemid=766
- ☐ Goal-Attaining: [Resolving Run-On Patients:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=205&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=205&Itemid=766
- ☐ Goal-Attaining: [Where's the Money: Production:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=272&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=272&Itemid=766
- ☐ Goal-Attaining: [Dealing With a Practice Downturn:](http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=287&Itemid=766)
http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=287&Itemid=766

Check off the boxes of the steps you have completed