

Customize Your Marketing Plan

*Strategies to Help Your
Dental Practice Reach Its
Optimal Earning Capacity*

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In one survey, only 10% of doctors indicated that they operate their practice at optimal capacity.

According to an article on marketing, “Yes – You Do Need a Marketing Plan!,” found in *The McGill Advisory (Volume 21 Issue 10/October 2006)* only 10% of doctors surveyed indicated that they operate their practice at optimal capacity. Conversely, 90% need to increase their new patient flow to increase their personal income. According to the same article, practice profits remain high mainly because of yearly fee increases, but personal income has declined over the past months. In what category do you fit? Assuming you are in the 90% category, let’s move forward with some ideas and concepts that will help reverse that trend.

To reach optimal capacity you will need to reverse the downward slide and work at turning it into an upward swing. Take a serious look at your marketing strategies. This can be tricky business, time consuming and expensive. *What marketing strategies?* you may ask! Very few doctors have seriously looked at the feasibility of a marketing plan, created marketing strategies and worked at reversing the downward decline.

Motivating Factors

Currently, supply and demand is favorable since more dentists are retiring than the numbers entering into practice. But, the competition for dental services is not from other dentists. It is from those providing other types of goods and services where patients use their discretionary income. You want patients to utilize your services with the dollars available to them.

So, even though you may be as busy as you want to be, you should examine your marketing strategies. Do you have a marketing strategy? If you do not, that’s even more reason to develop a customized marketing plan for the practice.

Ask yourself what you want to do:

- change your practice image
- take action to optimize your capacity
- accentuate the image you have
- or start from scratch and develop a marketing strategy.

No matter which of the above goals you have, start by determining what you need to do to pursue developing a marketing plan. Right from the start, you will realize that you will need to devote more time, effort and money to develop and implement such a plan. Don’t let those obstacles keep you from moving forward. You have a lot of help right at your fingertips. You have a staff that has many ideas, just waiting to be asked. You have patients that can tell you their needs. You have a practice that concentrates on certain aspects of dentistry that will be the basis upon which you build a marketing plan. And you have the following material to guide you along the way.

If you keep doing what you are doing, you will get the same result...generate the same level of income...and continue to be stuck in the 90% category. And how is that working for you?

Planning Stage

Ask yourself what your marketing focus has been. Has it been focused on you, the doctor, and your qualification and philosophy, etc., or is it patient needs focused? What are the reasons the patients believe your services are important? Instead of focusing on what you think is important, determine the patients' real or perceived needs. Then target them.

Analyze the Practice

Take a hard look at your practice. Look at the resources available to you such as:

- your staff
- the facility
- your financial resources
- the location of the practice
- the department or services you would like to expand
- the type of services you offer that you would like to optimize, or highlight
- the type of patients that are located in the general area of the office that will be your target
- your equipment and staff needs to handle the additional workload
- the opportunities and positive aspects of the practice that have not been tapped
- the commitment from the staff to assist you as you proceed with developing a customized marketing plan.

To assist with the analysis of the practice, use the “Survey of Current Practice, A Practice Analysis Tool” found in Addendum A. It can serve as the basis for evaluation of the current marketing activities and serve as ideas and suggested activities that could be incorporated into the development of a customized marketing plan.

Set aside time for the practice analysis and brainstorming sessions. Then hold a staff meeting. Take each of the above items and involve the staff in the idea generating process. Be willing to accept their insights and ideas. Remember to keep the discussion patient needs focused.

Getting Started

After the practice analysis, let's assume that you reach the conclusion that the practice can sustain an expansion and you will make the effort to develop and implement an effective marketing plan.

Basic Characteristics of a Customized Marketing Plan

Here are a number of ideas to assist you in building a successful marketing plan. Use this as a guide and checklist.

Any marketing plan must be:

- In writing
- Outline clearly delineated marketing strategies
- Contain related action steps
- Determine what is to be done to achieve the steps
- Set specific dates for completion of action steps
- Determine the person/s who will perform specific duties
- Identify what will determine success

It must be developed and implemented by the whole staff.

- This produces a spirit of ownership for the whole project.
- Be sure all staff play some part in assuming tasks for which they are responsible.
- Reward good ideas.

It must be analyzed at intervals to determine the success of the activities and strategies.

- Build in the schedule of dates when the analysis will be done.
- Require reporting by staff and/or persons responsible for activities as to the progress of their specific assignments.
- Look at each strategy individually
- Reward met deadlines and evidence of success.

It must be reviewed on a regular basis to determine if it is producing the desired results.

- Include the intervals when the plan will be reviewed.
- Post a marketing calendar containing dates when specific activities will take place
- Reward successful efforts.

It must be flexible enough to modify and change those things that are not working.

- Match the standards and measures of success that are identified in the plan with each strategy.
- Change, modify or expand as needed.

It must be given enough time to produce results.

- Be patient and let the plan work.

Elements of a Marketing Plan

The customized marketing plan should reflect the practice. Each of the following elements should be addressed and included in the Marketing Plan. Each of these elements can be used as chapter headings in the document. The ideas following each element are provided as suggestions that can be incorporated in your marketing plan. Each of these will not be relevant to every practice.

1. Identify the *target market*
 - Children
 - Elderly
 - White collar workers
 - Blue collar workers
 - Neighborhood people
 - Those with a fear of having dental work done
 - Those who have neglected their oral health
 - Apartment and/or condo dwellers
 - Current patients
 - Young working class
2. Determine the *services and/or department* to be accentuated
 - General dentistry
 - Promoting good general oral health
 - Treatment of the elderly
 - Cosmetic dentistry
 - Full mouth reconstruction
 - Implants
 - Sedation dentistry
 - Painless care
 - Orthodontics
 - Children
 - Adults
 - Surgical procedures
 - Care of the elderly
 - In the office
 - At nursing homes
 - Patients from Senior Apartment complexes
 - Patient education
 - Psychological and mental benefits
 - Improved appearance – the beauty of your smile
 - Improvement of self confidence and self worth, success on the job
 - Pediatric dentistry
 - Periodontics
 - Risk factors for serious health problems
3. Determine the *message* of any materials developed
 - Types of literature:
 - Newsletter
 - Brochure
 - Coupons
 - Patient satisfaction survey
 - News releases
 - Letters
 - The message
 - Your needs are at our command



- We accept new patients
- We specialize in ...
- We cater to ...
- Our concentration is ...
- New treatments incorporated into the practice
- New equipment to better serve you
- We want you as our patient
- We provide tobacco cessation materials
- Denture care is important
- Oral cavity health

4. Identify the types of *publicity* to be used

- Advertisements in
 - Local newspaper
 - Yellow pages
 - Theatrical programs
 - Placemats in local restaurants
 - On billboards
 - Radio ads
 - TV ads
- Sponsor local events
- Belong to local clubs
- “Lunch and Learn” sessions at businesses or health care facilities
- Clothing with logo

5. Identify the *direct marketing* avenues to be used

- Mailers
- Newsletters
 - Feature new techniques
 - Feature new staff
 - Provide oral health tips
- Val-Pak coupons for exams, x-rays, etc.
- Introduction letter of new staff
- Website

6. Identify *public relations* opportunities to be pursued

- Speak at
 - Local schools
 - Nursing homes
 - Senior Citizen Centers
 - High school career days
 - Professional organizations: Kiwanis, Chamber of Commerce, Rotary
- Participate in the Children’s Dental Health Month
- Participate in Give Kids A Smile (GKAS)
- Provide exams for local sealant programs sponsored by health department and agencies
- Direct patients to health orientated websites such as www.MouthPower.org



and www.wdahealthychoices.com

- Hold an open house
 - News releases
 - Articles for local paper on dental health topics
 - Include photo of staff
7. Give close attention to *internal marketing and patient conveniences*. Many of the following amenities and conveniences are generally found in practices and can be accentuated in the literature promoting the practice. If upon analysis the practice does not do these things, decide if they have merit to introduce them into the practice. They include:
- Phone answering policies
 - Easy to read statements
 - Comfortable and inviting reception room
 - Concern for the length of waiting time before being taken to operator
 - Organized recall system
 - Calling patients with missed appointments
 - Patient satisfaction tool
 - Ask patients to refer their neighbors and friends
 - Reward patients who refer new patients
 - Software patient tracking system
 - Communication with patients through e-mail
 - Waiting room comforts such as TV, radio, current magazines, dental literature, play area
 - Conduct in-service for staff on marketing and customer service concepts
 - Have a website
 - Be included on the city/chamber website
 - Use an intraoral camera to promote treatment
 - Conduct patient education
 - Have convenient payment arrangements
 - Arrange for flexible hours, expanded hours
 - Parking convenience
 - Toll free number
 - Elevator in building if more than one floor
8. Review the materials that display your *image*.
- Letterhead
 - Logo
 - Business cards
 - Mailing labels
 - Envelopes
 - Brochures
 - Prescription forms
 - Office literature
 - Personnel clothing

Write the Message

Tips for Writing Marketing Material: Newsletters, Brochures, Letters

Of course, it takes time to create a newsletter, brochure or letter, and time is money. There is also a cost for postage if the piece is mailed. The big challenge is getting the recipient to open it.

So, ask yourself:

- Will the newsletter stand out in the daily stack of mail and inspire potential patients to read what you are offering? Make the material outstanding!
- Will your call to action be clear, strong and compelling enough to inspire patients to want to check out your practice? Have a clear call to action!
- Will you write with excitement and make the revitalized efforts sound welcoming to those who may have passed your practice but did not see fit to examine what you have to offer? Write with excitement and appeal!

Plan the Copy

No matter what you are planning to write—a newsletter, brochure, or letter—ask yourself the following questions:

1. Who is my target?
2. How would they like to be spoken to?
3. What is my message?
4. What would I like them to do after they read my copy?
5. What are the benefits of what I can do for them?
6. Where is this information going to appear?
7. What sets me apart from my competition?
8. Will testimonials from patients be included?

After you have answered these questions, begin writing.

Draft the Copy

At least get something on paper. The first few lines, paragraphs, or pages you write could wind up on the cutting floor, but get something written. It will be a start.

Edit the Copy

Expect to have several drafts. Editing will make all the difference between an effective marketing piece and mediocre text. You are not finished until you have ticked off all the items on this list.

- Delete jargon, clichés and fluff

- Read the copy out loud—several times—and change anything that is clumsy or sounds stilted
- Check spelling, especially people’s names; check grammar
- Show your copy to other people—preferably those who know your practice
- Have a simple message
- Be sure to have a call to action—what you want them to do
- Be sure your copy is benefit focused
- Make sure your copy is interesting and informative
- Leave it sit for 24 hours, re-read it before finalizing it
- Add subheads if the copy is long
- Check all contact details

When you think you are done, ask someone with good skills to proofread it for you. Find someone with design skills to help with the look and feel of the piece. It is always a wise investment to obtain professional help.

Package the Material for Maximum Appeal

A couple of additional questions to consider that may assist in getting the potential patient to open the mail from you are:

- What type of envelope will be used—a business envelope or a personal-looking one?
- Will it be mass-mailed with labels and look like junk mail?
- Or will someone personally address the envelopes to intrigue potential readers to open the envelope?
- Be sure the letter inside has a headline that catches readers’ interest enough to give your communication more than a five-second scan.
- The close should include a welcoming call to action.

Follow Up

Consider personal phone calls to those to whom the material was sent. If you are offering a discount, free x-ray, consultation, or cleaning, a follow-up call may prompt them to take advantage of the offer.

If you are encouraging them to attend an open house, the call may encourage them to attend.

If you are offering your participation in a program such as Give Kids A Smile, be sure to provide dates, times, necessary approval forms, etc.

Establish a Feedback System

After all the effort, time and expense of developing a marketing plan and creating marketing tools and materials, it is logical to track and monitor how patients

Success is not only defined by what you think it is, but rather how your patients perceive the value, quality and quantity of services you provide.

respond. Were you successful? The front desk should record the number of new patients who enter the practice as a result of their responding to the marketing material. If several marketing tools were utilized, be sure to have the patients identify which of those used stimulated them to respond. A good gauge of your effort's success is the number of patients who actually schedule patient exams. A good standard is to try to seek an 85% minimum conversion rate from initial calls to scheduled treatment.

A monetary incentive can be offered to the staff who track this statistic monthly and boost the ratio of conversions, always working to reach the 85% and beyond.

Success is not only defined by what you think it is, but rather how your patients perceive the value, quality and quantity of the services you provide. When it comes to customer service, perception is reality. Satisfaction surveys, questionnaires and/or personal questioning can provide that valuable information.

Financial Commitment

To achieve the success of a marketing plan it must be sufficiently underwritten. How is the financial commitment determined?

According to the article from The Mc Gill Advisory entitled "Yes – You Do Need a Marketing Plan!" referenced in the opening paragraph of this document, "The financial commitment required depends upon the extent of additional new patient flow required to reach optimum capacity."

To determine that amount, the article includes a chart* that outlines "the percentage of gross collections recommended to be spent on marketing based upon the doctor's current percentage of optimal capacity."

This chart and the subsequent paragraphs are taken directly from the article.

Percentage of Current Optimal Capacity	Percentage of Collections Spent on Marketing
95 – 100%	1%
90 – 94%	2%
85 – 89%	3%
80 – 84%	4%
75 – 79%	5%
70 – 74%	6%
Under 70%	7%

In order to determine the percentage of optimal capacity, doctors should determine their total production on a highly productive day and multiply it by the number of clinical days worked per year. This provides the doctor with the maximum (optimal) production. Dividing this number by the actual daily production over the past year will determine the doctor's current percentage of optimal capacity.

For example, a doctor grossing \$750,000 who is operating at only 75% of capacity



should spend \$37,500 ($\$750,000 \times 5\%$) on marketing.” That may be shocking and will cause a huge spike in overhead. “However, doctors must remember that marketing represents an investment, not an expense. If the doctor’s marketing program is effective to increase his operating capacity from 75% to 95%, this would result in an additional \$200,000 of collections. Based upon an incremental (extra) overhead rate of 40%, 60% of the additional \$200,000 in collections or \$120,000 in additional profit would result. Thus, the \$37,500 annual investment would yield a \$120,000 return. This represents an investment return of 320%!

Conclusion

It may take some attitude change to realize that the cost of marketing is a financial investment, not an expense. It will take time and effort on the part of the whole practice to step outside the comfort box and move out of the old marketing rut. Focus on what makes a patient call the office, on what the patient deems important. Concentrate on patients’ buying decisions by looking at the factors that they consider important in obtaining your services. As you have probably gathered by now, there is no “canned” marketing strategy or plan that fits each and every practice. With the approach outlined here, the plan you develop and initiate will fit the practice needs and the all important needs of the patients.

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* This information was reprinted with permission from The McGill Advisory, a monthly newsletter devoted to tax, financial planning, investment, and practice management matters exclusively for the dental profession, available for \$209 a year from John K. McGill & Company, Inc., Lake View Professional Building., 8816 Red Oak Boulevard, Suite 240, Charlotte, NC 28217; or call (704) 424-9780 for further information.

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Addendum A

Survey of Current Practice: A Practice Analysis Tool



The following survey will help you identify and evaluate the strategies your practice is already using to solicit new patients. It can serve as a starting point for assessing your current marketing situation. Some of the questions may not seem to apply to your practice, but evaluating new marketing activities or tactics with a “fresh set of eyes” may help you to recognize new opportunities, and thus begin the process of building a marketing plan that is customized to your practice. A marketing plan will help your practice reach optimal capacity and/or increase the profitability.

Survey of Current Practice Building Strategies

Ask yourself if your dental practice is currently taking advantage of the following marketing strategies or opportunities:

Category	Strategy	Yes	No
Plan of Action	1. Do you have a list of personal objectives?	<input type="checkbox"/>	<input type="checkbox"/>
	2. Do you have a business plan?	<input type="checkbox"/>	<input type="checkbox"/>
	3. Does the staff know the business objectives?	<input type="checkbox"/>	<input type="checkbox"/>
	4. Does each staff member have goals that assist in the growth of the practice?	<input type="checkbox"/>	<input type="checkbox"/>
	5. Is the staff held responsible for their goals?	<input type="checkbox"/>	<input type="checkbox"/>
	6. Do you review the plan annually?	<input type="checkbox"/>	<input type="checkbox"/>
	7. Are you satisfied with your practice image?	<input type="checkbox"/>	<input type="checkbox"/>
Internal Marketing	1. Do you have a policy for how to answer the phone?	<input type="checkbox"/>	<input type="checkbox"/>
	2. Do you have a standard method of answering the phone?	<input type="checkbox"/>	<input type="checkbox"/>
	3. Is the office staff usually punctual?	<input type="checkbox"/>	<input type="checkbox"/>
	4. How long do your patients have to wait in the reception area before being taken to the operator?	<input type="checkbox"/>	<input type="checkbox"/>
	5. Are your bills and statements easy to read and comprehend?	<input type="checkbox"/>	<input type="checkbox"/>
	6. Do you have an organized recall system?	<input type="checkbox"/>	<input type="checkbox"/>

Category	Strategy	Yes	No	
Internal Marketing (continued)	7. Do you have a system of calling those who miss their appointments?	<input type="checkbox"/>	<input type="checkbox"/>	
	8. Does your staff meet on a regular basis to discuss methods of reaching out to new patients?	<input type="checkbox"/>	<input type="checkbox"/>	
	9. Do you feel that the staff chemistry is conducive to building the practice?	<input type="checkbox"/>	<input type="checkbox"/>	
	10. Does the staff work together as a unit?	<input type="checkbox"/>	<input type="checkbox"/>	
	11. Does the staff know your business objectives?	<input type="checkbox"/>	<input type="checkbox"/>	
	12. Is the staff part of the overall goals of the practice?	<input type="checkbox"/>	<input type="checkbox"/>	
	13. Are there incentives in the plan to reward staff when goals are reached?	<input type="checkbox"/>	<input type="checkbox"/>	
	14. Do you and the staff ask patients if they are satisfied?	<input type="checkbox"/>	<input type="checkbox"/>	
	15. Do you specifically ask patients if they have friends and/or neighbors that they might like to refer?	<input type="checkbox"/>	<input type="checkbox"/>	
	16. Do you thank patients for referrals?	<input type="checkbox"/>	<input type="checkbox"/>	
	17. Do you evaluate the success of your goals with the staff?	<input type="checkbox"/>	<input type="checkbox"/>	
	18. Does your software track how patients find your office? (word of mouth, telephone directory, print advertising, other)	<input type="checkbox"/>	<input type="checkbox"/>	
	Advertising	1. Do you offer freebies?	<input type="checkbox"/>	<input type="checkbox"/>
		2. Do you have your practice name and description in the local phone book?	<input type="checkbox"/>	<input type="checkbox"/>
		3. Do you have your name in neighboring city phone books?	<input type="checkbox"/>	<input type="checkbox"/>
		4. Have you ever bought space in the local newspaper to offer "dental tips"? It can look like an informational column, not an ad.	<input type="checkbox"/>	<input type="checkbox"/>

Category	Strategy	Yes	No	
Advertising (continued)	5. Have you ever advertised in local theatrical programs, table placemats for local restaurants, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	
	6. Do you advertise that you are accepting new patients?	<input type="checkbox"/>	<input type="checkbox"/>	
	7. Have you ever run a banner across your building that indicates that you accept new patients?	<input type="checkbox"/>	<input type="checkbox"/>	
	8. Do you sponsor local events?	<input type="checkbox"/>	<input type="checkbox"/>	
	9. Do you sponsor local sports events or teams?	<input type="checkbox"/>	<input type="checkbox"/>	
	10. Do you belong to local clubs?	<input type="checkbox"/>	<input type="checkbox"/>	
	11. Do you run radio ads?	<input type="checkbox"/>	<input type="checkbox"/>	
	12. Do you provide clothing for the staff with your name on it?	<input type="checkbox"/>	<input type="checkbox"/>	
	13. Do you advertise on a billboard?	<input type="checkbox"/>	<input type="checkbox"/>	
	Direct Marketing <i>Direct Mail</i>	1. Do you send out direct mailers promoting your practice?	<input type="checkbox"/>	<input type="checkbox"/>
		2. Does your software track the number of contacts as a result of the mailing?	<input type="checkbox"/>	<input type="checkbox"/>
		3. Do you repeat the mailer in regular time increments? (quarterly, every half year, yearly)	<input type="checkbox"/>	<input type="checkbox"/>
		4. Do you have several mailer pieces?	<input type="checkbox"/>	<input type="checkbox"/>
5. Have you determined which has been most effective?		<input type="checkbox"/>	<input type="checkbox"/>	
Direct Marketing <i>Newsletters</i>	6. Do you have a newsletter that goes to patients?	<input type="checkbox"/>	<input type="checkbox"/>	
	7. Do you send the newsletter to prospective patients?	<input type="checkbox"/>	<input type="checkbox"/>	
	8. Do you feature new types of treatments?	<input type="checkbox"/>	<input type="checkbox"/>	
	9. Do you answer insurance questions in the newsletter?	<input type="checkbox"/>	<input type="checkbox"/>	
	10. Do you explain new technology you have incorporated into the practice?	<input type="checkbox"/>	<input type="checkbox"/>	

Category	Strategy	Yes	No
Direct Marketing Newsletters	11. Do you tell patients about new skills you have acquired?	<input type="checkbox"/>	<input type="checkbox"/>
	12. Do you feature new employees in your newsletter?	<input type="checkbox"/>	<input type="checkbox"/>
	13. Do you feature your staff in the newsletter?	<input type="checkbox"/>	<input type="checkbox"/>
Patient Satisfaction Survey	1. Do you ask patients to complete a satisfaction survey?	<input type="checkbox"/>	<input type="checkbox"/>
	2. On the survey, do you ask how you can be of greater service to them?	<input type="checkbox"/>	<input type="checkbox"/>
	3. Have you ever included a coupon in "Val-Pak" for free x-rays, exams, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
	4. Have you ever sent out an introductory letter or postcard highlighting new staff (hygienists) targeted to a list of households?	<input type="checkbox"/>	<input type="checkbox"/>
Website	1. Do you have a website?	<input type="checkbox"/>	<input type="checkbox"/>
	2. How often do you update your site?	<input type="checkbox"/>	<input type="checkbox"/>
	3. Do you track the number of hits on the site?	<input type="checkbox"/>	<input type="checkbox"/>
	4. Is there a way patients or prospective patients can contact you through the website?	<input type="checkbox"/>	<input type="checkbox"/>
	5. Do you post content information on the site?	<input type="checkbox"/>	<input type="checkbox"/>
Patient Education	1. What method of patient education do you use?	<input type="checkbox"/>	<input type="checkbox"/>
	2. Who conducts the patient education?	<input type="checkbox"/>	<input type="checkbox"/>
	3. Do you use education tapes or CDs?	<input type="checkbox"/>	<input type="checkbox"/>
Public Relations	1. Do you or your staff speak at local schools?	<input type="checkbox"/>	<input type="checkbox"/>

Category	Strategy	Yes	No
Public Relations (continued)	2. Do you speak at nursing homes?	<input type="checkbox"/>	<input type="checkbox"/>
	3. Have you ever talked to seniors at the Community Center on dental care for the elderly?	<input type="checkbox"/>	<input type="checkbox"/>
	4. Have you participated in your local high school's "career days" or fairs?	<input type="checkbox"/>	<input type="checkbox"/>
	5. Do you send news releases to the local newspaper on general dental topics accompanied with a photo of the staff?	<input type="checkbox"/>	<input type="checkbox"/>
	6. Have you ever hosted an "Open House" to which referral sources are invited? (physicians, nurses, realtors, dental specialists, mental health counselors, child/day care administrator)	<input type="checkbox"/>	<input type="checkbox"/>
	7. Do you belong to professional organizations like Kiwanis, the Chamber of Commerce, the Rotary, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
	8. Do you participate in Children's Dental Health Month?	<input type="checkbox"/>	<input type="checkbox"/>
	9. Do you participate in Give Kids a Smile (GKAS)?	<input type="checkbox"/>	<input type="checkbox"/>
	10. Do you provide exam for local sealant programs?	<input type="checkbox"/>	<input type="checkbox"/>
	11. Would you rate your community involvement positively?	<input type="checkbox"/>	<input type="checkbox"/>
	Conveniences	1. Do you communicate with patients through e-mail?	<input type="checkbox"/>
2. Do you have radio and/or TV in the waiting room?		<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have a web page?		<input type="checkbox"/>	<input type="checkbox"/>
4. Are you listed on your city's or town's website?		<input type="checkbox"/>	<input type="checkbox"/>
5. Do you use an oral camera to promote treatment?		<input type="checkbox"/>	<input type="checkbox"/>

Additional Questions

These questions require more than a yes/no answer. Answer as many as you can as best as you can. Be specific.

Patient Demographics

1. Who are your patients?
2. What are the ages of your patients?
3. How many patients do you have in each age category?
4. What type of treatments do you provide?
5. How many new patients do you take a month?
6. Where do your new patients come from? (location)
7. How far do your patients travel to your office?
8. What are the reasons patients give for leaving the practice?

Technology

9. What software do you use? How efficient is the staff in using it? What do you use the computer for?
10. In what additional ways could you use the computer?
11. Do you track the source of new patients on the computer? (brochure, letter, work of mouth, etc.)
12. Do you think you need technical assistance with your computer to make it more productive in tracking your growth?

Target Market

13. Who is your target market? (children, the elderly, white collar workers, blue collar workers, neighborhood people, cowards, apartment or condo dwellers)
14. Is there a segment of the market different from that from which you now draw your patients that would bring in new patients?

Practice Image

15. What area/department of the practice do you think could help increase production?

16. Do you recommend high end services?
17. What type of service would you like to expand?
18. What type of service do you offer you would like to optimize?

Materials to Enhance Image

19. Logo
20. Letterhead
21. Business cards for dentists and senior staff
22. Mailing Labels
23. Envelopes
24. Brochures
25. Prescription forms
26. Office literature
27. Thank you notes
28. Personnel clothing
29. Patient Newsletter

Financial

30. Do you generate monthly analysis of key financial facts about the practice?
31. Do you generate monthly analysis of key operational facts about the practice?
32. When was the last fee analysis and when did you last raise your fees?
33. Do you monitor the following (information can be grouped by practitioner, practice location, etc.):
 - Gross collection percentage (cash collections divided by gross charges)
 - Net collection percentage (cash collections divided by gross changes less adjustments)
 - Accounts receivable aging (total accounts receivable divided by gross charges per day)
 - Days in accounts receivable (total accounts receivable divided by gross charges per day)
 - Payer mix (or gross charges by paper, e.g. , Medicare, Medicaid, commercial, self-pay, and other)
34. What do you do with the data? Do you perform the following activities:

- Learn to analyze the variables in valuable ways.
 - i. It may be helpful to know gross charges by full time equivalent practitioners rather than total gross charges
 - ii. Look at payments per visit
 - iii. Look at billing errors
 - iv. Look at relative value units per FTE
 - v. Look at the percentage of collections actually collected upfront
- Compare your results
 - i. Compare this period to the same period one month ago, one year ago, etc.
 - ii. How do they differ?
 - iii. Is there anything different about the practice that caused the change?
 - iv. What is the same?
 - v. Adjust the operations based on this research
- Compare yourself to industry benchmarks
 - i. Get stats from the ADA Survey material
 - ii. Be sure to compare apples to apples
 - iii. Understand the definition of the gross charges from the survey and the practice.
- Does it include all gross charges?
- Does it exclude technical charges, (lab, radiology, etc.)
- Establish practice norms
 - i. Set norms for your specific practice
 - ii. Example: a typical benchmark for days in accounts receivable may be 60 days, but if your practice bills 95% electronically, your days in accounts receivable may be less than this benchmark.
 - iii. Establish a benchmark for your practice and try to reach that number consistently.

Use the findings of the survey above as stepping stones to customize a marketing plan for your practice.

Refer to other parts of this white paper for assistance in developing a customized marketing plan for your practice.