



ExecTech Management Consulting

Tips and Ideas

Holiday

Season

Success

Checklist

ExecTech's Holiday Season Success Checklist

Many practices' production drops between Thanksgiving and New Year's Day because they either fight the holidays, let the holidays take over or simply close down.

The most successful way to handle the holidays is to use the holiday spirit to your advantage. Make all that energy work for you without letting it take over your practice. Get yourself, your staff and your patients behind the holiday activities *you* sponsor. Even if you do not celebrate Christmas, many of your patients and staff probably do. Their attention will wander from your practice if you do not take steps to capture their attention first.

Practice owners who use these recommendations usually have their best December production ever. Some of the steps in this plan are corny, but they work! Even your most sour patients will get a lift from the office's holiday enthusiasm.

Some of these items involve hard work. You may also get tired of holiday music. But for these ideas to work, the hard work must be done and the office must be full of life and celebration!

1. Plan to Prosper

Disagree with any ideas that everyone can kick back and take it easy.

Instead, set tough, but realistic production targets for you and your team. Meet and discuss strategies of how you will reach the goals.

Work out what you want to do for the holidays and write up a plan. If you have a consultant, send a copy of the plan to him or her for suggestions, or create it during a consulting meeting.

2. Hold a Staff Meeting

Staff members are more committed when they are included in the decision-making aspect. Use the meeting to obtain your staff's willingness and understanding of your plan ideas. Do not issue the final plan until after the meeting.

3. Decorate the Office

Decorate for Thanksgiving and then for the December holidays right after Thanksgiving. Play holiday music in the reception area every day. Keep a plate of treats on your front desk for patients and others who come into the office during December.

4. Send a Holiday Mailer

While pre-printed holiday cards are traditional, attract more attention by sending something different. For example, include a gift certificate or newsletter with the card. Make the card part of a practice brochure. Print a photograph of you and your staff on the front. Send calendars, magnets or other novelty items.

If your holiday mailer is not interesting or useful, it will be taped to the fireplace and forgotten.

5. Mail Letters to Insurance Patients

Every insurance patient, especially dental patients, should be aware of their options before the year ends. Have a staff member make a list of patients whose insurance coverage is affected by the year change.

Your computer may be equipped to send a personalized letter that prints the exact amount of coverage remaining on their insurance for the year.

Sample letter text:

Dear (Patient Name),

As the year comes to a close, I would like to remind you that some of your insurance benefits may run out at the end of next month.

Many insurance policies give you a certain amount of care each year. If you do not take advantage of this benefit during the year, you will lose the benefit.

Other policies pay a greater portion of your treatments if you receive the care before the end of the year. For example, if you have already paid your deductible amount for the year, you will not need to pay this deductible amount again this year. But if you wait until after December, you will need to pay the deductible amount before your insurance company will resume paying.

We can help you receive the benefits available to you. We will be open extra hours during November and December to ensure you receive your annual benefits. If you are not certain what benefits you are entitled to with your insurance, you can call our insurance expert, Jill Doe, for assistance.

We have other activities scheduled for November and December of this year. For example

If I do not get the opportunity to see you before January, please accept my holiday wishes and hopes for a prosperous new year for you and your family.

Yours,

□ 6. Call Insurance Patients

If you first send a letter (above) and then call these patients, you will get best results. Sample scripts:

"Hello, Mrs. Jones? This is Jill at ABC Dental. I'm calling to let you know your dental insurance policy gives you \$1500 per year in dental care. You have only used \$500 of this coverage when you were here last June. If you do not use the remaining \$1,000 of your benefits by the end of the year, you will lose this benefit. Dr. ABC wants to complete your treatment program and would like me to schedule an appointment to continue your care."

"Hello, Mr. Smith? This is Jill at ABC Medical. Did you receive our letter regarding your insurance? I'm calling to let you know you will save money if you come in before the end of the year and get your physical and blood tests. Since you have already paid your \$300 deductible, the workup will only cost you"

□ 7. Sponsor a Charity Drive for Thanksgiving and/or Christmas

Collect food, clothing, cash or toys for the needy. Center the drive around the needy needing a better Christmas Day. Give a gift certificate, exam or other service to the patient in exchange for the donation. Require the patient come into the office.

For example, make some signs for the front desk and walls that say something like, *"Donate a can of food to the homeless. If a friend or family member brings a can of food they will receive a free examination and consultation."*

If you do not want to give away free exams, consider giving a \$10 or \$15 gift certificate for use in your practice in January.

Co-sponsor this effort with a non-profit organization or church group. They may provide a barrel or boxes with signs on them, e.g., your local Fire Department, Goodwill, homeless shelters, Second Harvest, City Team Ministries or your local church.

You can even involve local businesses. Invite them to solicit donations from their employees or customers and bring them to your office. Signs in the windows of local stores and public service announcements on radio or in the newspaper will take your PR even further.

Make a poster or thermometer that shows a target and how many cans of food, articles of clothing, toys or cash that have been donated so far. For example, *"TARGET = 250 CANS OF FOOD -- DONATED SO FAR = _____"*

Have staff call all past patients. Work out who can call past patients during the day and early evening. Divide the number of past patients by 15 which will tell you how many hours of calling time is needed (15 calls per hour). For example, if you have 1,000 past patients, you will need to schedule 66.67 hours for calling.

Sample script:

"Hello, this is ___ from _____. We are doing a food drive for the homeless so fewer people are hungry during the holidays. I was calling to see if you would look through your cupboards and bring in any canned food you could donate to the homeless. Our target is to get _____ cans of food by

_____. So far we have _____ cans so we really need your help. The doctor will give you a free consultation if you bring in at least one can of food.”

“You can bring a friend or your entire family as well, providing they each bring a can of food.”

If the patient is not interested, politely end off. Avoid message machines by calling back later on. Get a commitment and a date.

Cram the waiting area with boxes of food, clothing or toys. Put out additional boxes as needed. Make it important to donate and be very grateful to those who do.

Take a photo of all the food before delivering it to a local charity. Have the charity give you a letter of commendation to display in your front area.

If you sponsor a Thanksgiving food drive with good results, you can repeat the drive through December. “We had such a good response and the donations from our patients were so generous, we have decided to continue the drive through Christmas.” Even calling the same people can be effective. “Everyone was so happy about the 200 cans we donated, we decided to go for 300 during December...”

□ 8. Charity Day

The holiday season is an excellent time for charity work. In addition to the good feelings you stir in yourself, your staff and your patients, you can provide free treatment in a way that builds your PR and increases profits as well.

One successful idea is to organize a “Free Care Day” for patients in need. Dental office example:

“ABC Dental is devoting Saturday, December 8, for a Free Dentistry Day for those families who cannot afford basic dental care for their children. This is ABC Dental's holiday gift of care to Yourtown.

“Dr. ABC will work throughout the day providing dental care at no charge. XYZ Dental Supply will donate the supplies needed for these patients. And the staff members and hygienists at ABC dentistry are volunteering their time and will be working without pay.

“As a patient of ABC Dental, you can help with this special project by notifying people you know, who cannot afford dental care for their children, to contact this office for an appointment for December 8. We are especially interested in treating children who are not receiving regular dental care, but will treat anyone. As appointments are limited, they should call as soon as possible.”

Put up a poster announcing the event. Hand out fliers. Announce the event in your newsletter.

□ 9. Exam Fees Charity Donation

Have your staff call patients who have not been in for a while and say something like, “The doctor would like you to come in for an exam this month. And all the exam fees we collect in December will be donated to UNICEF's Children's Fund.”

Submit a press release to your local newspapers, radio and television stations as well.

You can also spend a day giving free exams or other help to shelters or other community agencies. Ask for staff volunteers to help you. Take a camera.

□ 10. Professional Referrals

The holiday season is a great opportunity to generate goodwill and new patients from your professional referral sources. Use the holidays to give them gifts, baskets, cards or treats.

For example, a batch of balloons attached to a basket of treats is noticed and discussed by everyone who comes in. “Wow! Who gave these to us?”

If you, as the practice owner, do not want to drop in on your referral sources' offices, send a cheerful staff member or your spouse to deliver the gift baskets.

If you do not have a list of referral sources to reward, the holiday season is a good time to start new relationships. There is nothing wrong with building a relationship with a referral source with a small gift basket, even if they only sent you one new patient during the year.

□ 11. Care Enough to Share

Encourage patient referrals when they are caring more about people they know. One practice created holiday cards for patients to give to their friends and family with a \$25 gift certificate for the

practice. The cards were given to the top patients who then gave them as gifts. Result: 12 new patients.

□ 12. Patient Christmas Party

Get ideas from your staff members. A big party with food, music and even some live entertainment can build goodwill with your patients, their friends and family. Invite all patients and encourage them to bring family and friends. Wear a Santa suit. Take photos of the event for a wall display.

□ 13. Throw a Staff Party

Decide on the best date, time, location and activities for the staff's party. Ask your staff for ideas. Consider a party at your house, a formal dinner at a restaurant, even a simple lunch.

Be careful about serving alcohol. If someone who attends the party drives while intoxicated after your party, you could be held responsible for any accidents or personal injuries.

During the party, go over the major events and statistics of the year. Praise each person's best accomplishments during the year. Give out awards and bonuses.

Outline goals for the new year. Exchange gifts. Have fun!

□ 14. Throw a Post-holiday Staff Party

Instead of working in an office party during December, January might be better for your group. January is a good month for a staff party as you will have fewer scheduling conflicts and less stress. You can use the party to celebrate the wins of 2012 and announce the goals for 2013.

□ 15. Attend Professional Parties

Build up your referral base by attending every holiday party and networking event possible. Many of the societies, study clubs and other professional groups throw parties, dinners or other events in December. Call them directly for the dates and times.

□ 16. Staff Scheduling Tip

Absenteeism is often high in December, thanks to the pressure of holiday shopping. So give each full-time employee one shopping day off during December . . . as long as they cover for each other so you don't notice anyone's absence.

□ 17. Make December a Record Month with a Production Game

You can boost December production and income to record levels if you use a staff bonus plan that you tie into production.

If you have no production game, staff can become distracted by the holiday noise. You see lots of appointments scheduled for January. You feel you are the only one trying to get the work done.

If you replace the traditional Christmas Bonus with a potentially larger bonus for high productivity, you and your staff get a more joyful, rewarding holiday season.

Arrange things so your staff members want a full, busy practice each day you are open this month. Set targets or quotas that you want, and that you believe your staff members can accomplish.

To set up your staff bonuses, select production quotas or accomplishments you want in December. For example: \$85,000 in production, \$75,000 in collections, the computer update program finally completed and the new employee fully trained to take over the front desk.

Next, work out a bonus that will get your staff excited. Cash is always popular, such as \$_____ if all targets are met, or ____% of the income if it exceeds \$_____.

Examples:

"A \$250 holiday bonus per full-time employee if the practice has \$100,000 in collections."

"\$100 bonus for all clerical staff if the 'wall of unfiled forms' is gone by December 21. No bonus to anyone if I find any mistakes when I check 20 random files."

"A 15% December pay bonus if the doctor is done by 6:30 P.M. for 15 of the 20 days we are open."

“A 15% December pay bonus if the doctor has no more than ten open slots for the rest of this month.”

Work out a consolation prize if the staff does not meet the targets. For example, donate the bonuses to nonprofit organizations selected by the employees, or pay the employee a smaller bonus.

Put the game in writing. Cover all details such as withholding taxes, part-time staff, pay dates and so on.

18. Help Your Staff with Their Production Games

If a football team owner failed to hire a coach, it would not matter what bonuses he or she promised. The team would lose every game. As a small business owner, the coach's hat is part of your job.

To win the game, remind the staff about it daily. Keep score. Call the plays. Give pep talks. If your team wins, you win.

19. Give Non-cash Bonuses

Use your imagination to give gifts to your staff members. Although cash is always welcome, personalized gifts can mean much more to your people as it shows you put some thought to their needs.

As well as actual gifts, retail gift certificates, a fancy dinner for the employee's family, extra paid vacation days and so on. Ask the employee's spouse for ideas.

20. Patient Scheduling Tip

If you are closing your practice for a week or more, consider increasing your hours before the holidays to make up for the time you will lose. Pack your schedule just before and just after the days you are closed.

21. Patients Who Refer

Use the holidays as an opportunity to thank those patients who recommend you to their family members and friends. Send them a special holiday card, poinsettia plant, cookies, gift certificate or small gift.

22. Have Patients Give Your Gift Certificates as Gifts

Print gift certificates for your patients to give to their friends and family members as gifts. For example, one practice saw 12 new patients in January from passing out holiday cards that patients could give to their friends and family with a \$25 gift certificate for services.

23. Make Every Day a Holiday

Keep everyone in your office cheerful by surprising them with something new every day or two. For example, bring in a big plate of fudge, add some twinkling lights to the front desk, award each employee a two-hour lunch period and so on.

24. Have Your Employees Give Gifts to Your Patients

Give each employee a \$100 credit check that they can give as a gift to the patient of their choice. The credit can be used to reduce a balance, pay for a new service or apply toward a co-payment. The employees should have no problem deciding whom they want to help with this gift.

An allergist did this with his ten employees. Most of the \$100 gifts went to low-income patients. The doctor said, "It was the best \$1,000 I ever spent!"

25. On the Days You Are Closed

Use your days off to catch up on paperwork, redecorate your office or other projects you have always wanted to do, but didn't have the time. You will be amazed at how much work you can get done when you work in the office alone.

Catch up your insurance reports. Clean off your desk. Find or create new patient education material. Paint the walls, clean the carpets. Learn how to use your computer. Catch up on your reading. Write a practice newsletter. Update your fee schedule.

Summary: Why Your Holiday Plan Will Succeed

If you, as the leader of your group, are not interested and excited with your holiday activities, the patients and staff members will be drawn to the enjoyment of the holiday activities outside the office.

However, if you create exciting holiday activities and communicate this excitement to your staff members on a daily basis from now until New Year's Day, everyone in your group will also become excited and the results will be stupendous!

Happy Holidays from Everyone at ExecTech!

Learn how ExecTech can help you increase your profit, reduce your stress and reach your goals. Visit **www.exectechweb.com** for more information or contact the office nearest you to schedule a free Practice Management Analysis.

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