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The Value

of strategic
planning

How to gain a competitive edge with software

The importance of strategic planning cannot be overemphasized. Strategic planning requires you to critically analyze your work environment. Relationships with vendors, staff, patients, and others can potentially impact the success of your business. Developing a comprehensive, thoughtful plan precisely defines your business, identifies your goals, and matches your strengths with the opportunities available. Whether you are starting out with your practice, looking at the upcoming year, or planning the day immediately ahead of you, practice-

management and clinical software can help determine where your practice is headed and provide the resources to thrive and grow.

Create your vision

The first step in the strategic-planning process is to assess your business environment and its goals. Create a purpose statement that includes what your objectives are and why you will be successful. Consider all of the factors involved in your past and present, and envision what you want to accomplish in the future.

“In many cases, we erase patients’ doubts by showing them images or X-rays of their teeth right from the clinical software.”

— Victoria Tatum, DMD, PA

When I began building my practice, my past included excellent training at the College of Dental Medicine at Medical University of South Carolina and a one-year, general-practice residency at Emory University in Georgia. In 1995, I purchased a dental practice previously owned by a general practitioner who had never even owned a computer during his 35 years in practice. With the objective to create a state-of-the-art facility, equipped with state-of-the-art staff and technology to perform state-of-the-art procedures, we had a long way to go.

Invest in your resources

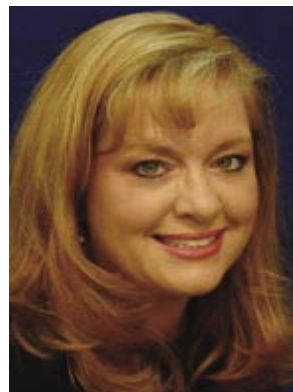
Our first step was to bring the existing paper-based practice up to date. After transferring the paper charts to computer files during the first few years, we looked into practice-management software and were one of the first offices to build a relationship with Patterson EagleSoft (customer 341, in fact). Making the transition was a practically seamless operation — we simply sent all of our database records to EagleSoft, and they took care of all the data conversion and training.

When planning for your practice, the decision to invest in practice-management and clinical software is really an investment in human resources. My dedicated staff is the backbone of our successful practice, and providing them with the training and tools to be their best creates a positive environment. We also subscribe to the Patterson EagleSoft service contract and update service, which provide automatic software updates, unlimited service help, and technical support. The training and support we continue to receive keeps us abreast of what’s new to serve our patients’ needs.

Strategic planning and smart investments have made my vision for the future a reality. As it has always been important to me to equip my team with the best in technology, we also have invested in clinical software from Patterson EagleSoft, Schick digital X-rays, the CAESY Education System, and intraoral and extraoral cameras during the years. Today, we provide

beautiful, quality dentistry in a relaxed, educational atmosphere that feels more like a home than a high-tech dental office.

As you enter our clinical space, each of the six operatories we designed maximize patient chair time. We do more in less time, and we also educate our patients better during the time we spend with them. Each operatory has one computer monitor at the foot of a leather chair. Another monitor is positioned behind the patient’s head. The assistant and doctor can view the schedule and patient listing while we display the patient’s chart and digital images on the patient’s screen. Our office also uses a lot of digital photography and X-rays. In many cases, we erase patients’ doubts by showing them images or X-rays of their teeth right from the clinical software. Making a visual case for treatment is a great tool to increase productivity.



Victoria Tatum, DMD, PA

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Patsy Murray

Ms. Murray studied at Brenau College in Gainesville, Ga. She has worked as a dental assistant, certified Patterson EagleSoft national trainer, and Schick Dental Radiography trainer. She has been Dr. Tatum’s office administrator and patient coordinator since 1993.

Maximize your potential

On a day-to-day basis, familiarity with your software is crucial. The ability to utilize the right resources at your fingertips determines how strategic or efficient your daily planning can be. The key to maximizing your staff's potential is to train them to handle unexpected changes in your business environment by using the right software features at the right time.

At the front desk, for example, we use EagleSoft OnSchedule to manage our appointments and create an efficient, productive, and profitable work schedule. The customized toolbar gives us quick access to the Day or Week at a Glance views, the Quick Fill List, and the Appointment Search feature. It also is easy to schedule Family Appointments or move existing appointments using the Appointment Queue.

Another great feature is InContact, which assists with calling patients with recalls, calling patients with delinquent accounts, as well as tracking responses from calls. When processing recalls, we can send them to InContact and print them out as a call list. We also can customize and print laser postcards to verify our patients' appointments.

Anticipate what lies ahead

Gaining a competitive edge in a technology-driven business requires proactive planning, which is critical to running a successful practice. Rather than reacting to a situation as it arises, proactive planning allows you to analyze environmental factors and allocate your resources accordingly.

A great tool for dealing with unexpected obstacles is the Patterson EagleSoft Money Finder feature, which will search your patient database by Appointment Status, Insurance Status, Recommended Work, Planned Treatment Status or Completed Treatment Status to produce a list of

patients who fit your needs. Contacting patients who have neither completed their follow-up visits nor have met their deductibles and have remaining benefits is a good way to fill your appointment schedule when there is a change.

Practice-management software is an excellent tool to help track, monitor, and evaluate progress. Establishing timelines and milestones allows you to gauge your progress and compare projections to accomplishments. The EagleSoft Trends feature, for instance, can track the performance of your practice. You can easily view office totals according to specified criteria or import and enter data according to month or year and print the information. Our accountant directly exports our productivity numbers, which tell us where we are for the month compared to our office forecast, as well as relative to the industry.

Of course, sometimes you cannot forecast or imagine what will come. Our office once went down during a lightning strike about five or six years ago, and we lost our server and all computers. But, we back up our data files daily and were prepared with a quality software provider. Patterson EagleSoft sent us a new copy of our software and helped retrieve our data. We were running within days after the physical hardware was restored.

Creating a strategic plan ultimately guides you through the various phases of your business, and, while we cannot avoid natural disasters, a thoughtful plan can help you identify obstacles so you can avoid them and establish alternatives. Enlisting software into your practice and using it to your advantage can take your practice where it needs to be in the next month, year, and decade. Create your vision, invest in your resources, maximize your potential, and anticipate what lies ahead if you want to get ahead. ■