



# Scheduling for Higher Efficiency, Production and Profit

How to reduce no-shows, cancellations  
and stress in your dental practice



## About the Author

**Cathy Jameson** is the founder of Jameson Management, an international dental management, marketing and hygiene coaching firm. The Jameson Method of Management, developed by Cathy, offers proven management and marketing systems for helping organizations improve their workflow and efficiency in a positive, forward thinking culture. Cathy earned a bachelor's degree in education from the University of Nebraska at Omaha and then a master's degree in psychology from Goddard College. She received her doctorate from Walden University. She considers herself a lifelong learner and encourages those around her to be in a constant state of study, growth and action. She is the author of several books, including her latest title "Creating a Healthy Work Environment." For more information on Jameson Management's services, visit their website at [jamesonmanagement.com](http://jamesonmanagement.com).

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# Diagnosing a Broken Schedule

## Is This Happening in Your Practice?

Poor scheduling can be a major source of stress in your dental practice. If your appointment book is full but office tension is high, your scheduling process may be broken.

Ask yourself:

- Are cancelled appointments and no-shows an epidemic in your practice?
- Does your office consistently run behind schedule?
- Are you rushing one appointment so you can get on to the next?
- Does it take weeks before you can fit a new patient into your schedule?
- Does your schedule allow you to perform the kind of dentistry you want to do?
- Are schedule holes causing excessive stress on you and your team?
- Is your schedule so overbooked that you don't even have time to eat?
- Is your schedule burning you out?

***If you answered "yes" to at least three of the above questions, your scheduling process needs repair.***

This eBook can help you prevent scheduling problems and build a more productive and profitable schedule. Done properly, scheduling can reduce no-shows, cancellations and stress in your dental practice.

When you have more organized, smoother days, your patients will receive more concentrated, quality attention from you. Your improved concentration and lowered stress will be of ultimate benefit to your patients and to you.

Plus, you'll get to practice the kind of dentistry you desire.

### ***Ten Schedule Stresses and Their Solutions***

1. **Late patients.** If you run late, you're training patients to be late.
2. **Improper scheduling of time units.** Analyze how long each procedure takes.
3. **Poor software or lack of training.** Schedule in 10-minute units for each active chair.
4. **Emergencies.** As much as possible, provide palliative care and reschedule.
5. **Doctors scheduled in two rooms at once.** Assign when and where the dentist should be with no overlaps.
6. **Improper delegation.** Delegate to your clinical assistant as much as your state allows.
7. **No detail in the schedule.** Include procedure specifics for proper room and tray setup.
8. **Poor communication.** Keep your team well informed.
9. **Personal phones.** Minimize cell phone use during work hours.
10. **Talking about non-dental issues.** Be friendly but focus on the business at hand.

Source:  
[http://www.jamesonmanagement.com/partners/CJ\\_CausesOfSchedulingStress.php](http://www.jamesonmanagement.com/partners/CJ_CausesOfSchedulingStress.php)

# Preventing Schedule Problems

## How Each Team Member Can Help

Preventing broken appointments, no-shows and other schedule problems isn't just the appointment coordinator's job, it's everyone's job.

Here are six ways your team can help:

1. **Give patients a reason to come back.** At the end of every appointment, the clinical team member who is with the patient should stress the significance of the next appointment. Discuss the benefits of the next appointment and the possible risks of not showing up.
2. **Learn the verbal skills of scheduling.** The appointment coordinator should indicate the amount of time being blocked for the patient in the doctor's schedule. Help the patient accept responsibility by saying something like, "The doctor has reserved this time for you and we're relying on you to be there."
3. **Confirm appointments.** Confirm in a positive manner and always stress the importance of the appointment and the patient's responsibility for the appointment.
4. **Change your after-hours voicemail greeting.** Some patients will call at night and leave a recorded cancellation message. Discourage this by changing your greeting to reflect the preference that they call during business hours.
5. **Reschedule immediately.** If a patient calls about changing an appointment, reschedule them while they are on the phone.
6. **Bring it up in morning meetings.** During your daily team briefing, discuss how to fill any voids in the hygienist's or doctor's schedule. Enlist team members to audit charts and look for patients who could possibly fill the open time slots, such as those with past-due treatments, unappointed restorative work or unappointed family members.

### **Team Guidelines**

Following these simple guidelines can help keep your schedule on track:

- Make it a practice rule: **No one leaves the office without a scheduled appointment.**
- Understand the amount of time needed for each procedure and each appointment.
- Train everyone who touches the appointment book how to use the scheduling software.
- Acknowledge delays to patients who are waiting and thank them for their patience.
- Ask patients about their next appointment and help them understand its value.
- Address clinical or financial concerns in a private area—not at the checkout counter—before patients leave your office.
- For best results, schedule appointments face-to-face.
- Build relationships with your patients to give them more reasons to come back.

# Building a Balanced Schedule

## How to Avoid Production Highs and Lows

Building a balanced schedule—with the right mix of primary, secondary and tertiary procedures—allows your practice to avoid highs and lows in production. (See Figure 1 on p.7)

- **Primary procedures** have a higher dollar value attached to them, such as crown and bridge, endodontics, dentures and partials and most cosmetic procedures.
- **Secondary procedures** have a lower dollar value, such as simple composites and extractions.
- **Tertiary procedures** have no dollar value attached, such as seating of crowns and bridges, suture removals, etc.

The secret to getting the right mix of procedures into your schedule is pre-blocking: reserving specific time slots each day for primary procedures. Pre-block your days for approximately half of your production goal. Then add secondary and tertiary procedures around your primaries as needed.

***The key to productivity is not how many patients you see in a day, but how much dentistry you do in a day.***

Schedule a variety of procedures each day to meet a specific, daily production goal, rather than aim for a certain number of patients per day. This smooths out the highs and lows, increases your productivity and reduces financial and physical stress for you and your team. As a result, your patients will appreciate you more.

For example, let's say your monthly production goal is \$70,000 and you work 16 days per month. Divide \$70,000 by 16 to find your daily production goal of \$4,375 per day. Break this down to to \$3,000 for the doctor and clinical team and \$1,375 for the hygiene department.

### ***Scheduling Essentials***

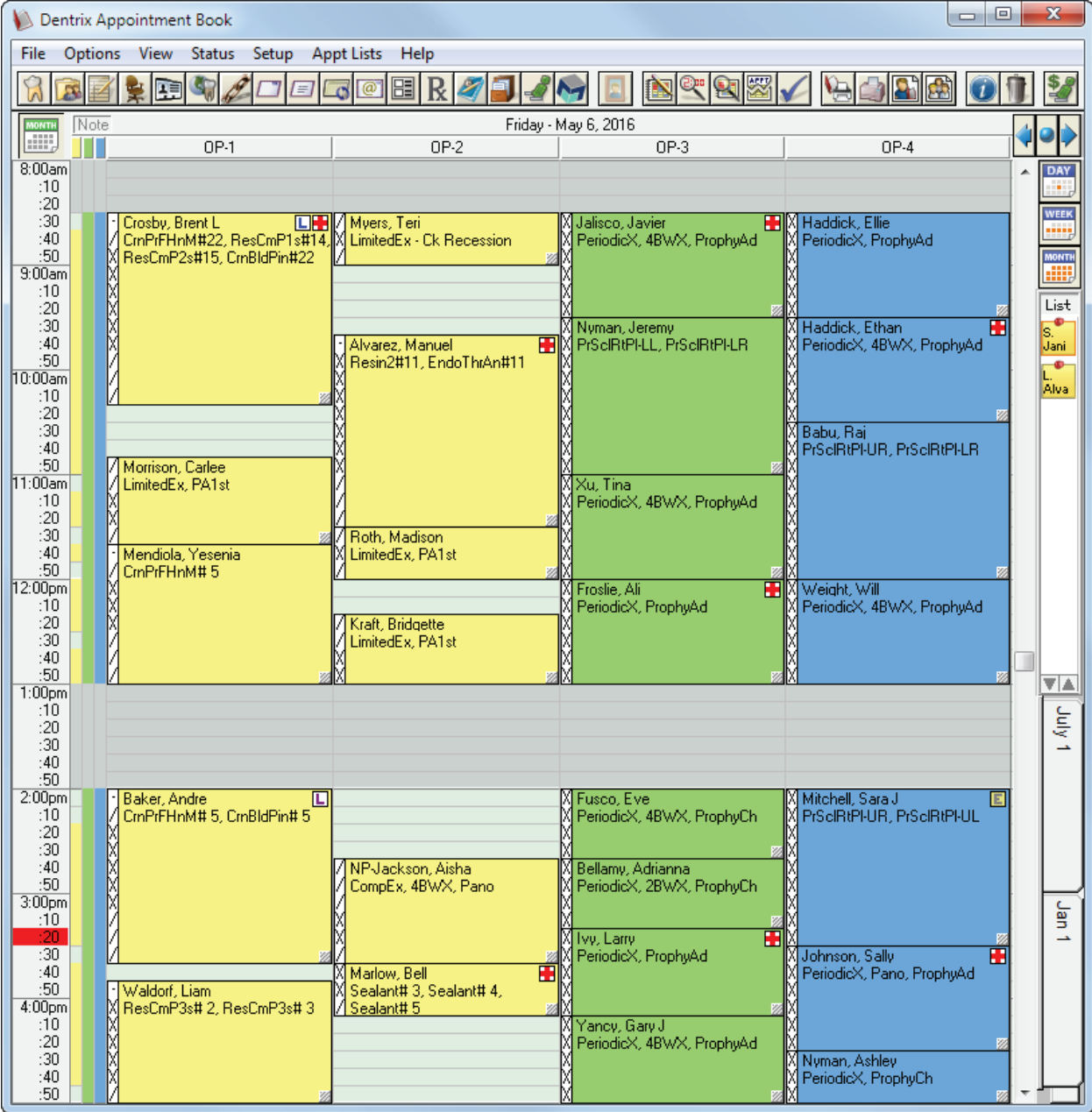
1. Schedule toward a pre-determined goal – yearly, monthly and daily.
2. Include a variety of procedures in your day – primary, secondary and tertiary.
3. Pre-block approximately half of your daily goal in primary procedures.
4. Delegate. as much as possible so the doctor can focus on doing what only a doctor can do.
5. Analyze how long a procedure takes for both doctor and assistant and schedule enough time.
6. Provide hygiene evaluations at a natural break in the doctor's schedule rather than at the end of a hygiene appointment.
7. Always make financial arrangements prior to scheduling an appointment.
8. Schedule fewer patients in a day, do more dentistry when and where appropriate and see patients for fewer visits.

Source:  
[jamesonmanagement.com](http://jamesonmanagement.com)

# Building a Balanced Schedule

## How to Avoid Production Highs and Lows

Figure 1: Example of a balanced schedule with a mix of procedures



# Sell the Value of Every Appointment

## Great Communication = Great Production

Dental appointments deal with people's money and time, two of the most important things in their lives. People break appointments if they don't understand their importance—or value—compared to everything else going on in their busy lives.

Part of fixing scheduling problems includes improving treatment recommendations. If your patient is only interested in how much their insurance will cover a given treatment, you've failed to sell the value of your services.

The following strategies help you communicate value when presenting recommended treatment:

- **Empower your hygienists.** Hygiene appointments are the most frequently broken type of appointments. Patients may not feel the need to come in if they're not experiencing any problems. Because 40 to 60 percent of the dentist's production comes directly from hygiene, it's critical to empower hygienists as patient educators. Give them the time, equipment and technology to help patients see the value and benefits of treatment.
- **Use visual aids.** Videos, photos and X-rays help show patients "this is what's going on in your mouth." Show before and after pictures to illustrate treatment benefits (or risks of skipping treatment).
- **Discuss total wellness.** Explain how your treatment will help patients with their health, appearance, breath, snoring or other wellness issues.
- **Listen.** Answer patients' questions and hear out their concerns. Slow down and pay a little bit more attention to people and what brought them to you in the first place. This builds a relationship of trust that will solidify their commitment to attending appointments.
- **Find financial solutions.** Work with your patients to find payment options so they can overcome any financial barriers to treatment. If patients aren't clear and comfortable with the financial arrangements, they'll cancel or no-show.

### ***Four Factors of Buyer Acceptance***

Poor communication is the underlying reason for most appointment cancellations.

Until your patients truly understand the value and benefits of treatment, they may schedule an appointment only to cancel it later.

In today's competitive dental market, patients won't "buy" what they don't understand.

You and your team can prevent cancellations by focusing on these critical factors of buyer acceptance:

1. **Need** for the visit
2. **Value** of the treatment
3. **Urgency** of the procedure
4. **Trust** in the provider

Communicate these four factors *before* you schedule an appointment and your patient is more likely to keep it.

Buying decisions are based on people seeing value. Be sure to schedule enough time to present your treatment plans, explain their value and clear the way for acceptance.



# Coping With a Broken Schedule

## Leverage Your Dental Software

Even if you follow the best scheduling practices, someday your schedule will fall apart.

No-shows are the worst. Call any patient that is five minutes late. If they answer, express concern: "We have this time reserved for you, are you OK?" See if they can come in for a partial appointment and at least get them rescheduled. Put the patient data in the tickler file if you are unable to reach them.

Remember, today's lost production is lost forever. It's more important to focus on filling today's schedule than four weeks out. To fill last-minute openings, look at your appointment book:

- Is there someone from restorative you can move to hygiene, or vice versa?
- Is there someone in the afternoon you can move to morning?
- Is there someone scheduled tomorrow or later this week you can move to today?

Your dental software can help you keep current lists of patients you can call to fill unexpected schedule voids.

### Ask a Professional for Help

Dental practice consultant Cathy Jameson understands that scheduling is the lifeblood of your practice. She has helped thousands of dentists worldwide become more productive with her proven management strategies. Contact her at [jamesonmanagement.com](http://jamesonmanagement.com).

### Rely on the Industry Leader

Dentrix provides software solutions for greater productivity and profitability in your practice. That's why more than 35,000 dental practices rely on Dentrix today.

In addition to full-featured clinical tools, Dentrix includes financial analytics, accounting and billing tools, innovative eServices, training seminars, profitability coaching and more.

### Dentrix Tools

Henry Schein's Dentrix includes these scheduling tools:

- **Perfect Day Scheduling** for pre-blocking appointments to meet your production goals.
- **ASAP List** for patients who want to get in sooner than originally scheduled.
- **Continuing Care List** for unscheduled patients who are overdue for hygiene.
- **Treatment Manager Report** for finding patients who need a certain procedure so you can fill a specific time slot.
- **Treatment Plans with Benefits Available Report** for patients who have treatment plans posted to the Ledger and unused insurance benefits available.
- **Unscheduled List** for patients who have either broken an appointment or asked to be on will-call.
- **Automated Reminders** for upcoming appointments that allow patients to confirm by text message or email.

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