



Conditions & Statistic Management Seminar

Implementation Points

NOTE: This write-up is being provided as suggestions and ideas from which to apply the seminar information to your office. This is not to be taken as a guarantee that the information provided is appropriate to your practice. Each practice is individually responsible for ensuring that any system implemented complies with the applicable federal, state and local accounting, tax and employment laws, rules and regulations governing the place in which your practice is located. These suggestions do NOT constitute legal or accounting advice. You should seek advice from your own accounting and legal advisors as to what is appropriate to implement in your practice, prior to implementation. MGE: Management Experts, Inc. is not responsible for any claims, real or otherwise, associated with this document or any part thereof.

What follows is a summary list of implementation points from the seminar this weekend. Contact the Power Client Practical Department at MGE if you need any help or have any questions about these.

- _____1. Determine a day and time that your week will end. This should be the same day and time for every week.

- _____2. Begin tracking the following statistics on a weekly basis (you can add more in the future:
 - a. **LETTERS OUT**
 - b. **BULK MAIL OUT (BMO)**
 - c. **\$ VALUE TREATMENT PLANS PRESENTED/SOLD**
 - d. **# CONSULTS**
 - e. **COLLECTIONS**
 - f. **ACCOUNTS RECEIVABLE**
 - g. **PRODUCTION**
 - h. **HYGIENE PRODUCTION**
 - i. **DOCTOR PRODUCTION**
 - j. **RECALL APPOINTMENTS KEPT**
 - k. **% APPOINTMENTS KEPT**
 - l. **COLLECTIONS DIVIDED BY STAFF**
 - m. **# OF NEW REACHES**
 - n. **NEW PATIENTS**

- _____ 3. Get these stats set up in your stat program to be graphed weekly.
- _____ 4. Have a staff meeting. During this meeting, go over:
 - The basics of stat management.
 - What stats are being kept by the organization and why.
 - Go over who is responsible for each stat.
 - How to graph their stats, both on a daily and weekly basis.
- _____ 5. Individually, ensure each staff member understands their stat and how to graph it. Stats should be at the staff member's workstation - other staff might be able to see the graph, but don't have it in public view.
- _____ 6. Find a space to place your OIC and post it. This should be maintained weekly.
- _____ 7. On a daily basis during morning meetings, staff report their stats to the OM. Use something similar to the attached grid to track daily progress. This is helpful to debug production issues on an immediate basis, rather than waiting until the end of the week.
- _____ 8. At the end of each week, each person reports their stats to the Office Manager.
- _____ 9. Individual staff would also graph their own statistics.
- _____ 10. Get your staff hatted on condition applications to ensure they learn how to apply weekly conditions and do a battle plan. As they are learning, the OM can review each staff member's weekly stat with them and help them through the condition and develop a battle plan. Copies of any condition applications should be sent to the person's senior or the OM.
- _____ 11. Ensure you apply steps 1-5 from the article on page 36 of the Seminar Materials Booklet on a regular basis with your OIC.
- _____ 12. Executives to meet weekly and review weekly statistics as well as coordinate an organization battle plan. Stat trends may also be viewed at this time for handling. Any targets from these meetings are assigned and done.

Sample Daily Statistic Tracking Grid

Dr. _____

STAT GRID WEEK ENDING DATE: _____

STAT NAME	QUOTA	FRI	SAT	MON	TUE	WED	THU	TOTAL
LETTERS OUT								
BMO								
TXP/S								
CONSULTS								
COLLECTIONS								
PRODUCTION								
HYG. PROD								
DR. PROD								
RECALL APPT								
% APPT KEPT								
# REACHES								
# NPS								