



## MANAGEMENT BY STATISTICS

When you return home, you'll begin tracking the following statistics on a weekly basis (you can add more in the future). Some will be tracked daily and weekly. Stats that would also be kept on a daily basis are marked with

- \_\_\_\_\_ **a. BULK MAIL OUT "BMO" (D):** Total volume of ALL mail sent out from the office – including letters out. For example: 100 flyers and 10 letters go out in a given week. This would constitute 110 Bulk Mail Out.
- \_\_\_\_\_ **b. LETTERS OUT (D):** Personally signed letters (non-form letters) sent out of the office.
- \_\_\_\_\_ **c. \$ VALUE TREATMENT PLANS PRESENTED/ACCEPTED (D):** Total dollar value of treatment plans accepted and scheduled in a given day or week.
- \_\_\_\_\_ **d. # CONSULTS (D):** Number of consult (Treatment Presentation) appointments kept.
- \_\_\_\_\_ **e. \$ COLLECTIONS (D):** Total monies collected by the office.
- \_\_\_\_\_ **f. ACCOUNTS RECEIVABLE (A/R):** Total amount owed to the office – less any credit balances on account. For this statistic, you'll want the amount owed without factoring in credit balances. Most software programs can report this accurately.
- \_\_\_\_\_ **g. \$ PRODUCTION (D):** Charges for procedures performed. In the event you have a sizeable amount of write-offs or discount/HMO or PPO plans, you may wish to also keep an Adjusted Production Statistic (i.e., Production less adjustments).

- \_\_\_\_\_ **h. HYGIENE PRODUCTION (D):** Production from the Hygiene Department.
- \_\_\_\_\_ **i. DOCTOR PRODUCTION (D):** Production from procedures done by the doctor/doctors as opposed to hygiene.
- \_\_\_\_\_ **j. INDIVIDUAL PROVIDER PRODUCTION (D):** Each individual provider (doctors and hygienists) should have their own production stat. If you have one doctor and one hygienist, “h” and “i” above should suffice. If there is more than one, each should have a separately tracked production stat and this can be combined for “h” and “i” above.
- \_\_\_\_\_ **k. # RECALL APPOINTMENTS KEPT (D):** Number of patients who come in for a “recall” appointment – i.e., 3, 4 or 6-month. This would not include patients on the hygiene schedule who are scheduled for perio (scaling and root planing, etc.) treatment.
- \_\_\_\_\_ **l. % APPOINTMENTS KEPT (D):** Overall office percentage of appointments kept (i.e., patient showed up), versus the patients who were scheduled.
- \_\_\_\_\_ **m. \$ COLLECTIONS DIVIDED BY STAFF:** Total \$ value of collections divided by the number of staff. Full-time staff would count as 1 and part-time staff would count as .5 for this stat. The main owner/doctor should also be counted on this stat.
- \_\_\_\_\_ **n. # OF NEW REACHES (D):** Number of promotional responses and inquiries from prospective new patients received via phone, internet, mail or any other communication medium.
- \_\_\_\_\_ **o. NEW PATIENTS (D):** Number of new patients who actually arrive at the office for an appointment, whether for an initial exam, consultation or emergency appointment.

**Note:** These are suggested stats for you to begin keeping immediately. If you find that there are additional statistics you would like to keep, then by all means do so. Keep in mind that you should ensure that any stats you add actually represent a product or sub-product.