

# CHARLENE WHITE'S PRACTICE NEEDS ASSESSMENT

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| Do you have written practice goals?                    | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have a written marketing plan?                  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have budget goals?                              | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are you pleased with your team's performance overall?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are you frustrated with staff management?              | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Would you like to increase your production?            | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Would you like to increase your number of starts?      | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Would you like to increase your number of exams?       | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are you pleased with your case acceptance?             | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have a capacity to see more exams?              | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have any team members you would not rehire?     | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Would you like to reduce your overhead?                | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Would you like to reduce your number of patient days?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are you pleased with your current scheduling template? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you want to know where your practice stands?        | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

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Name

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Email Address

Contact Phone Number

**Email to Charlene@charlenewhite.com**

# MEET CHARLENE

## WHO IS CHARLENE?

Charlene White is one of the leading orthodontic consultants in the country. Her goal-oriented consultations are individually tailored to empower the team and guide the practice toward greater productivity and heightened personal satisfaction. Charlene began her consulting career in general dentistry in 1980. Her consulting company, Progressive Concepts, Inc., was founded in 1983 at which time Charlene began specializing in the field of orthodontics. Charlene received her Bachelor of Science degree in 1975 from Old Dominion University.

## CREDENTIALS

An internationally renowned speaker, Charlene White is a frequent presenter for national meetings of the AAO, and many regional and state orthodontic societies including the Southern Association, the Northeastern Society, the Southwestern Society, the Pacific Coast Society, the Midwestern Society, the Great Lakes Association, and many others. Charlene was also the first consultant ever elected to the AAOF Board of Directors.

## ANNUAL EVENTS

Charlene and Progressive Concepts sponsor many live seminars each year that offer orthodontists and their staff the opportunity to interact with Charlene in a lecture format. They include her annual East Coast Convention for the Orthodontic Team in Myrtle Beach, SC, which was founded in 1986. She also trains New Patient Coordinators in a seminar setting at least twice each year in a variety of locations, and hosts a highly intensive training day for orthodontists and their spouses each year called the Peak Performance Workshop.

## OTHER SERVICES

Charlene has authored a series of practice management aids, including manuals, cassettes, and videos that focus on training in all areas of orthodontic practice management. She has published many articles in the JCO over the years. Although Charlene's company, Progressive Concepts, provides this variety of services to the orthodontic specialty, Charlene still commits the majority of her time to the area of in-office consulting. That is her passion. You too can be one of her success stories.



# CONSULTATION SCHEDULE

## Upon Charlene's Arrival

The doctor should plan to talk with Charlene for 30 minutes to one hour the first evening to discuss the concerns and goals of the practice. This can be done over a dinner meeting or if the doctor prefers and has other plans, can touch base with Charlene via telephone.

### Day One:

#### *Morning*

- \* **Patients are scheduled as normal**
- \* Charlene should be picked up at her hotel at 7:30 a.m. – 8:00 a.m.
- \* Staff members will be interviewed individually for 5 – 10 minutes.
- \* Charlene will focus attention on all priority areas.

#### *Lunch*

- \* Charlene prefers to eat a “take-out” lunch in the office. She uses this time to contact her office, eat lunch and to continue working. She uses this time to contact her office, eat a quick lunch and to continue working. The staff should plan to have lunch on their own, as usual.

#### *Afternoon*

- \* Several new patients should be scheduled before 4 p.m. if the doctor wants Charlene to observe the new patient process.
- \* Charlene will need transportation back to the hotel at 5:00 p.m. so she can prepare for her evening meeting with the doctor.

#### *Evening*

Charlene will meet the doctor from 6:30 – 9 p.m. to discuss recommendations and review the outline of the next day's workshop. It is preferred that this meeting be held in a quiet restaurant. Many doctors have their spouses attend this meeting even if they do not work in the office.

### Day Two: *(This schedule may vary due to specific requests.)*

- \* **No patients are scheduled until after 1:00 p.m.**
- \* A workshop will be conducted including the doctor and staff beginning at 8 a.m.. The workshop should be held away from the office. During the workshop, recommendations for the practice will be discussed and projects will be planned together and implemented in accordance with the needs of the practice.
- \* Charlene will depart after 1:00 p.m. and will need transportation to the airport.

## FOLLOW-UP:

#### *Written Report:*

The doctor will receive a written report of Charlene's recommendations within two to three weeks following the consultation.

#### *Continued Support:*

Charlene's One Year Off-Site Management Program is highly effective. She meets monthly with you and your team to facilitate and implement.

# CONSULTATION RESULTS

## CHARLENE WHITE'S IN-OFFICE CONSULTATION YIELDS GREAT RESULTS!

Typically, Charlene White visits offices for an initial in-office consultation, and then returns a year later for a follow-up visit. The following chart illustrates the statistical improvements that were made in a practice after three consultations with Charlene.

PRACTICE AREAS	FIRST CONSULT	SECOND CONSULT	THIRD CONSULT	INCREASE
Collections	\$328,452	\$703,470	\$1,041,212	\$712,760
Production	\$339,303	\$756,474	\$1,109,996	\$770,693
New Patient Exams	240	330	467	227
Starts	114	226	330	216
Exam to Start Ratio	47.5	68.5	70.6	23%
Observations/Month	20	41	51.6	31
Number of Activities	256	463	546	290
Past Target Date	19%	10%	7.80%	11%
Number of Patient Days	150	135.5	143	7
Patients Seen/Day	28	50	60.4	32
Production/Day	\$2,262	\$5,582	\$7,762	\$5,500
Practice Overhead	65%	59%	54%	11%

# AREAS OF EVALUATION

**THE FOLLOWING ARE THE SYSTEMS CHARLENE WILL BE EVALUATING DURING THE CONSULTATION:**

- Scheduling templates
- Recall system
- Patient flow
- Filing system
- Bookkeeping system
- Inventory of supplies
- Collections system
- Overhead control
- Insurance system
- Intra-office communication
- Staff meetings
- Staff morale
- Staff compensation program
- Computer software utilization
- Job descriptions
- New patient process
- Case acceptance
- Marketing plan
- Customer service

# WHY INVEST IN A CONSULTATION

- Create a scheduling template that is productive and efficient
- Improve case acceptance
- Evaluate how well you are doing in all areas of the practice
- Work fewer patient days and produce more per day
- Streamline systems and improve consistency
- Target areas that need focus
- Reduce turnover and improve staff morale
- Reduce stress and enjoy going to the office in the morning
- Increase new patient numbers
- Increase production per day
- Increase profitability
- Reduce past due collections percentages
- Evaluate the personnel management
- Prepare the practice for the addition of a new doctor
- Prepare the practice for a move to a new location
- Improve the quality of their home life
- Have someone who understands, listens and validates your concerns
- Reach goals faster and more efficiently
- Develop accountability systems for the staff

# FAQ

## **What do we do first if we are interested in having Charlene work with our team?**

Contact Charlene's office. If Charlene is not in the office, she will call you back personally to discuss how a consultation could benefit you.

## **How do we prepare for Charlene's visit to our office once it is booked?**

The first thing you will do is complete the consultation package information that will be sent to you. This is information on your practice statistics and your goals for the consultation. Each staff member will also be asked to complete one form. Every detail of how to prepare will be sent to you in writing.

## **What areas does Charlene evaluate?**

The unique thing about Charlene is that she customizes your consultation based on your personal goals for your practice. She will also evaluate all of your major systems including the new patient process, the schedule, recall system, bookkeeping system, inventory system, collections system, overhead control, insurance system, marketing plan, and all other major systems in the practice. In addition, she will interview each staff member individually to get an insight into the staff moral of the team and other staff related issues.

## **Is the staff normally anxious about the consultation?**

Many are and that is normal. However, once they meet Charlene and understand that she is there not only to improve the working environment for the doctor but for them as well, their nerves are always calmed. Charlene wants a win/win for everyone on the team.

## **What will Charlene do the first day of the visit while patients are scheduled?**

She will observe the various systems in the office, interview the staff and interact with the team. If the size of your practice requires a three-day consultation, she will repeat that schedule on day two.

## **When does Charlene spend time one-on-one with the doctor?**

Charlene meets with the doctor the evening she

arrives for approximately one hour. The last evening prior to the workshop morning, Charlene has a dinner meeting with the doctor. Many include their spouses at this meeting.

## **What is the fee for the consultation?**

Charlene needs to determine your needs before a fee is quoted. Once Charlene talks with the doctor or office manager, she will be able to determine your total investment.

## **What happens at the workshop on the final day of the consultation?**

During the workshop, recommendations for the practice will be discussed (with the doctor's permission); projects will be planned together and implemented in accordance with the needs of the practice. You should be able to schedule patients after 2:00 p.m. However, many doctors prefer to take the afternoon off.

## **How do we implement everything that Charlene will suggest after she leaves?**

The doctor will receive a very detailed report of Charlene's recommendations within two to three weeks of her visit. This report is designed to use as a checklist for finalizing the implementation of ideas and suggestions. The doctor and the staff are encouraged to contact Charlene any time questions arise. Also, Charlene has a very complete line of training products for support as well.

## **Will Charlene need to return to our office?**

There are no contracts to sign and no commitments to make for future visits. Many offices prefer that Charlene come back annually to continue to fine-tune their systems.

Other practices find that they receive so much benefit from Charlene's first visit that they will not need to have her back in for two years. On an average, orthodontists see a \$200,000 a year increase in production after just one of Charlene's visits.

## **Will Charlene consult with my competitors?**

Exclusive contracts are available with an on-going consulting relationship with Charlene.