



# The Backup Plan

Who's on first?

**R**emember the old Abbott and Costello movies or their famous sketch "Who's on First?"

An orthodontic practice can become their very own animated version of this scenario when a team member suddenly leaves the practice, leaving no replacement, and walks away with many of the daily operative processes in her head... with no one anticipating the ramifications of this situation.

How do I know this? Because it happens. As a consultant

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I have seen offices totally unprepared for this situation and have seen firsthand the disastrous results and fallout that come from it. It is like a malfunctioning garbage disposal—chewing up everything and spewing it back up the drain and all over the kitchen.

Everyone is running around trying to pick up the pieces and perform tasks they do not know how to do. Marketing efforts diminish because everyone is just busy getting through the day. Contracts are not entered properly (if at all) and insurance is not filed correctly because no one understands the ins and outs of the financial functions of the software. Morale has taken its toll and no one is excited about coming to work tomorrow.

We are all members of the same team, each having a different function—much like the human body. But like the body all the members should work together to function as one body, each knowing what the other part's function is. When one part of the body shuts down, usually the body adapts and learns to function, sometimes in a different way. When the right arm is broken, the left arm picks up the slack and the left hand even learns how to write.

The days when an assistant was an assistant and wasn't

allowed to answer the phone (because it might be a new patient) are gone. Get with the program folks!

The scheduling coordinator not only needs to be proficient with her job description but perhaps could be cross trained in the clinic as a chairside assistant for when unexpected patient delays occur or be available to pop back in imaging and take an X-ray.

Have you considered having an assistant transform into a treatment coordinator in a time of necessity?

How do you get there? How do you make everyone so transparent? Or why would you want to?

- You want to because production is the livelihood for the doctor and the staff. If you can't see a new patient or be able to obtain case closure it will hurt the bottom line.
- You want to because keeping the consumer happy, providing good patient care, keeps patients coming back and referring to your practice.
- You want to because your expectations need to equal your staff's ability to perform with confidence. A happy doctor makes for a happy staff and vice versa.
- You get there by cross training and then actually expecting the staff to perform those tasks and job descriptions on a routine basis. This means performing that job function daily or weekly to stay proficient. Just knowing how it is done does, having the head

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knowledge, does not mean a team member can actually perform in that position if called upon in a crisis.

- You get there by spending time and money. Time to train with regular staff meetings (times apart from seeing patients) specifically designed to train on different software modules, scripting, and clinical procedures. When was the last time a staff person other than the treatment coordinator ran through the new patient workflow? I know one office that actually schedules one exam into the clinical schedule each day so each assistant gets the opportunity to see one new patient a week.
- You make everyone transparent when you accept everyone's input and short comings and work with them to build a team. This means listening to other's views without condescending remarks.
- You make everyone transparent when you accept everyone as being different. Work one on one with staff if they are not quite executing tasks at a level that is acceptable or need specific help with verbal skills. Not everyone will be good at everything. This does not make them a lesser valued team member.

What if your financial person went to the doctor tomorrow and was diagnosed with a long-term, life-altering illness and needed to resign immediately? What would you do? It happens... What is your "Backup Plan"?

You have to decide that cross training is a priority and necessary for your practice and then begin implementing it. Start now... To quote my husband, "You can't steer a parked car." ☺

## About the Author

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Penny Mustard has been involved in orthodontics for over 20 years as an orthodontic assistant, office manager, treatment coordinator, and marketing specialist. She brings a wealth of experience in the field of computer imaging and technology.