

## OWNER DOCTOR(S) LEADERSHIP CHECKLIST

### DAILY

- Review deposit slip and daysheet from prior day and compare to schedule
- Review actual vs goal from prior day for each producer
- Review actual vs goal for next day for each producer
- Review all adjustments and write-offs
- Be positive at all times – set a positive tone for each day
- SMILE --- a lot!!!!
- Be the biggest advocate in the practice FOR the bonus
- Compliment and encourage liberally and publically
- Correct and discipline conservatively and privately
- 100% focus on the business while in the building (no discussion of personal problems; no personal calls, emails, or texting; no personal errands; no Internet surfing; etc. (set the example)
- Teach/Train Constantly
- Be sure that claims are filed daily and statements are sent daily
- Ensure all appointments start and end on time

### WEEKLY

- Inspect to ensure that all graphs/monitors are current
- Review status of on-going patient reactivation efforts with person responsible
- Review A/R and outstanding insurance report with person responsible
- Verify sufficiency of schedule openings for new patients
- Be sure computer backup is valid
- Review current projects with Office Manager

## MONTHLY

- Review P&L from previous month and share results with team
- If budgeted items are out of range, discuss with person responsible
- Review actual vs goal from prior month for every producer and make any necessary adjustments for new month
- Review ROI for each external marketing item from prior month
- Review hygiene department recare percentage
- Conduct consistent monthly team meeting with input from everyone and a written agenda posted one week prior to the meeting

## QUARTERLY

- Review/plan external marketing items for next quarter
- Review tax planning with CPA
- Review office policy manual for any needed updates
- Review effectiveness of marketing plan and make any needed adjustments

## ANNUALLY

- Complete performance review for each team member
- Establish budgets for the following: dental supplies; office supplies; marketing; technology; remodel/refurbish; lab; compensation; etc., based on prior years results and new year forecast and assign responsibility to specific individuals
- Prepare marketing plan for the year
- Mark annual calendar for holidays, vacation(s), CE events, etc.
- Review CE credit requirements
- Raise the fees