

## Do you have a Betty?

By Denise Ciardello

I received a call from a doctor that was in a panic. It seems that his office manager, who had been with him for 18 years, put in her notice that she was going to quit. She gave him a 2-week notice, however, it was over the holidays when the office was closed for about 1 of the 2 weeks. There are 8 employees: 1 doctor, 2 hygienists, 2 assistants, a sterile tech, 1 admin and Betty, the Office Manager. This office manager was everything to this office.

Our team jumped into action to help this team and soon found out just how much of everything she was to this office. When someone called on recall, Betty created the report; when someone had a treatment plan, it was written on the tray cover, brought to the front and Betty would put it in the computer and present it to the patient. She was the only one who knew how to put in a new patient, do anything insurance related (verify, file a claim, process a claim), receive a payment of any sort... Yes, she was everything.

We soon found out that the mentality was that Betty found it easier to do it herself than to train anyone to do things. She never took a vacation when the office was closed. The doctor proudly told me that Betty had never taken a sick day in 18 years. When we asked about written processes, the team all agreed that there was no need since Betty knew how to do everything.

SOPs... Protocols... Processes.... Whatever you call it, this is the way that you do business. We call it our GTS Playbook. It tells your employees exactly how you expect things to be done every single time. It may seem like a difficult thing to do, however, it is the best way to ensure consistency, and accuracy and most successful businesses have thorough written Processes.

What all is included in the protocol? Everything that is to be done every single time. Consistency is the name of the game. If it is important, it needs to be included in the protocol.

A New Patient protocol might answer the following questions:

- When a new patient calls, how do you want the phone to be answered?
- What questions do you want asked/answered for clarification of the status of the appointment?
- How much time is scheduled and with whom?

A treatment plan protocol might include:

- How is the treatment put into the computer? By whom? When?
- Is the treatment reviewed with the patient by the doctor/assistant/treatment coordinator?
- Is the treatment plan prioritized by visits? In order of importance? Phases?
- Who discusses finances with patients?

It may seem like a daunting task to cover every protocol thoroughly, so I would like to have you think of this as a project. It's something that will take a bit of time to complete yet will be so worth it in the end.

Here are 4 things to remember as you are beginning, or for some of you, revising your processes manual:

- 1- Walk through the process as though you were teaching it to someone for the first time. Write down every step along the way. Once you have completed the entire process, review it step-by-step to see if it makes sense to you. Finally, give it to someone who does not do this task on a regular basis and see if they can follow the steps.
- 2- As you list the steps, be sure to keep all confidential information out of the process. This manual will be available for anyone to review, which would not be good to have account numbers, passwords or PIN numbers listed.
- 3- As you are listing the steps within the task, refer to the position of the person completing the task, not the person's name.  
*The assistant will escort the patient to the treatment coordinator's desk... instead of Becky will escort the patient to Mary's desk.*
- 4- You will want to be specific with the details, yet also be concise. Meaning less is more. It is necessary to list each step without listing the why for each step.

Some questions you may have include:



- ⇒ What protocols are the most important to write out?  
Only the ones that you feel are the heartbeat of your practice. We have a list of the major ones. Send us an email ([info@GTsgurus.com](mailto:info@GTsgurus.com)) for a copy of the list.
- ⇒ Who should write out the protocols?  
We recommend that everyone take responsibility for the tasks that they perform on a daily basis and write out the protocol for each one. It should not be something that interferes with daily operations of the office.
- ⇒ Is this all really necessary?  
Absolutely not. However, be sure to keep our contact information handy when your Betty leaves. ☺

Always remember that there should never be a single point of failure in your business. Everyone should have access to all the protocols, processes, SOPs... whatever you chose to call it. Cross-training in good, written protocols are even better. If you find that you need help getting started, give me a call.