

# Living IN THE TREETOPS

MEMBER ARTICLE | BY JULIE MOREAU, MAADOM

As we slide into the end of the year, it's time to formulate your What Next Plan. Your team will be looking to you for cues as to what the next year will hold. Finish up Q4 strong but resolve to start Q1 even stronger by beginning the new year establishing clarity with the team.

## STEP ONE IS TO BLOCK A DAY FOR A Q1 MEETING

Consider all logistics and choose to involve the whole team or just your top leaders. Make it as early in January as possible, and moving to a location offsite for a half day or whole day is not a bad idea. Check with community centers, libraries, or local churches for a private meeting space to accommodate your team if a nice hotel conference room is not available or out of the budget.

The idea is to remove the distractions of phones, EOBs sitting on your desk, the mail carrier showing up and the risk of even one patient dropping by to pay their bill. Avoid all possibility of disruption to the flow of ideas. Make it a fun event for your team to be excited about by including coffee and pastries in the morning or sandwiches and salad delivered for lunch. Just make these arrangements two days in advance, so it does not require your attention on meeting day.

## CONSIDER SOMETHING TO KICKSTART THE MEETING THAT WILL ENGAGE YOUR TEAM

One year, I used the PowerPoint (PPT) template

provided to AADOM members by Dental Intel to show the vital statistics for the recent year via a lively presentation. No need to reinvent the wheel; just use a template in PPT that fits your mood or personality.

I finished the PPT with a list of superlatives, highlighting top performers on the team. Be creative and give a good-natured poke at a team member who dominates the thermostat, takes initiative to clean out the refrigerator in the break room, drinks the most coffee, does the fastest digital scan, or is the office D.J. known for an exceptional playlist. Be creative, and have fun.

## THEN, IT'S DOWN TO BUSINESS

If you have never discussed Core Values or Core Vision with your team, do it now. If you have them, review them. Challenge your team to see who can name the most. The list of five to seven values should be prominently displayed somewhere in the office and talked about often. At every team meeting (weekly or bi-monthly), highlight a team member who exemplified one of the core values.

TREETOPS CONTINUED | PAGE 31



### ...TREETOPS CONTINUED

It may be time to refresh and be thoughtful about whether the Core Values have changed. As our practice has implemented new technologies and done extensive training on oral systemic methodologies, I believe “health,” for instance, will rise to a level of more intentionality as we’ve learned to appreciate that our work impacts every aspect of our patients’ overall health.

Try posting a large blank poster board in the break room. Ask team members to think-as-they-go for a couple of weeks and notice what common values are demonstrated through team and patient interactions. Add them to the board, anonymously or during meetings, and then hash through them to choose five to seven values that are consistent and really define what’s at the core of your business.

Core Vision is addressed much the same way. You may not get it done in one sitting. But get a start, edit for a couple of weeks and then try to gel it all together. Everyone in the office needs to know what the practice vision is and be fully aware of this purpose. In our office, that might sound something like this: “Our Core Vision is to build relationships with people who value optimum health and quality of life, help them discover how to achieve that and maintain

it, get paid a fair fee for the service we provide, and to grow personally, professionally and spiritually along the way.”

Whatever the mix of words and concepts is for your team, it should become the underpinning for every action, every decision, and makes it easier for each team member to know what is expected of them. Everything you do has to stand up to that vision.

### A CLARITY MEETING WOULD NOT BE COMPLETE WITHOUT A DISCUSSION OF GOALS

Start with the big goals, which means “where do we want to be by the end of the year?” That may include the number of new patients you want to bring into the practice, a new mix of services you want to add, new team members, and certainly a revenue number to reach. Break that down into a list of specific actions by department that will need to happen to reach the desired outcome. For example, if you want to add a hygienist, action items would be to write a catchy ad, make specific contacts, conduct phone screenings and/or in-person or video interviews, narrow the field, prepare a proposal, schedule onboarding. Put the list on a quarter-by-quarter timeline and assign a person responsible.

TREETOPS CONTINUED | PAGE 32



...TREETOPS CONTINUED

Another example is this: if you desire every team member to be able to take a digital scan in four to five minutes, ask yourself: who will train them, how often, how will they practice, and what's the plan for keeping them motivated? Get this specific with each action that leads to your big goal. Every person on the team should understand what their role is and how they, as an individual, will help achieve the goal.

**FINALLY, NARROW THE FOCUS TO JUST THE NEXT 90 DAYS**

What can you accomplish in Q1? What are your "rocks"? Identify those together and assign the name of the person responsible for driving it, along with a timeline for getting it done. If it's helpful, go ahead and draft a rough list of "rocks" for Q2, Q3 and even Q4, without getting tangled in details just yet. Just know that's where you're going, and Q1 rocks point you in the right direction.

There's an analogy in the book "Traction" by Gino Wickman and Kevin Pierce that describes a group of people trying to make their trek through a jungle. Each person was flailing away at underbrush, trying to figure out where to go, but they were just creating zigzags through the jungle. It was only when one person climbed to the top of a tree and surveyed the full expanse of the horizon that they could see the path that led them home. Finally, they could pull together, move in one direction and find their way.

As an office manager or administrator, get used to climbing the tree. ■

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## MEET THE MEMBER

Julie Moreau, MAADOM, is Practice Administrator for her husband Jim's dental practice MoreSMILES Dental, located on New Orleans' Northshore. She earned a journalism degree from The University of Alabama and landed at Tulane Medical Center as a publications editor. As newlyweds, the long daily commute seemed counterproductive to building a life together. So, with his only two team members on back-to-back maternity leave, the decision was made for Julie to enter the practice and learn both clinical and front desk to fill the void. As a force multiplier for her husband, the practice took off, adding team members, new patients, and eventually a new office with double the capacity. Julie had been in dentistry for 35 years before she found her way to AADOM during the Covid shutdown. She earned her Fellowship designation (FAADOM) in 2021 and received her mastership (MAADOM) designation in 2023.

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<sup>1</sup> CareCredit Cardholder Engagement Study, conducted by Chadwick Martin Bailey on behalf of CareCredit, Q2 2021

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