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TROJAN TODAY

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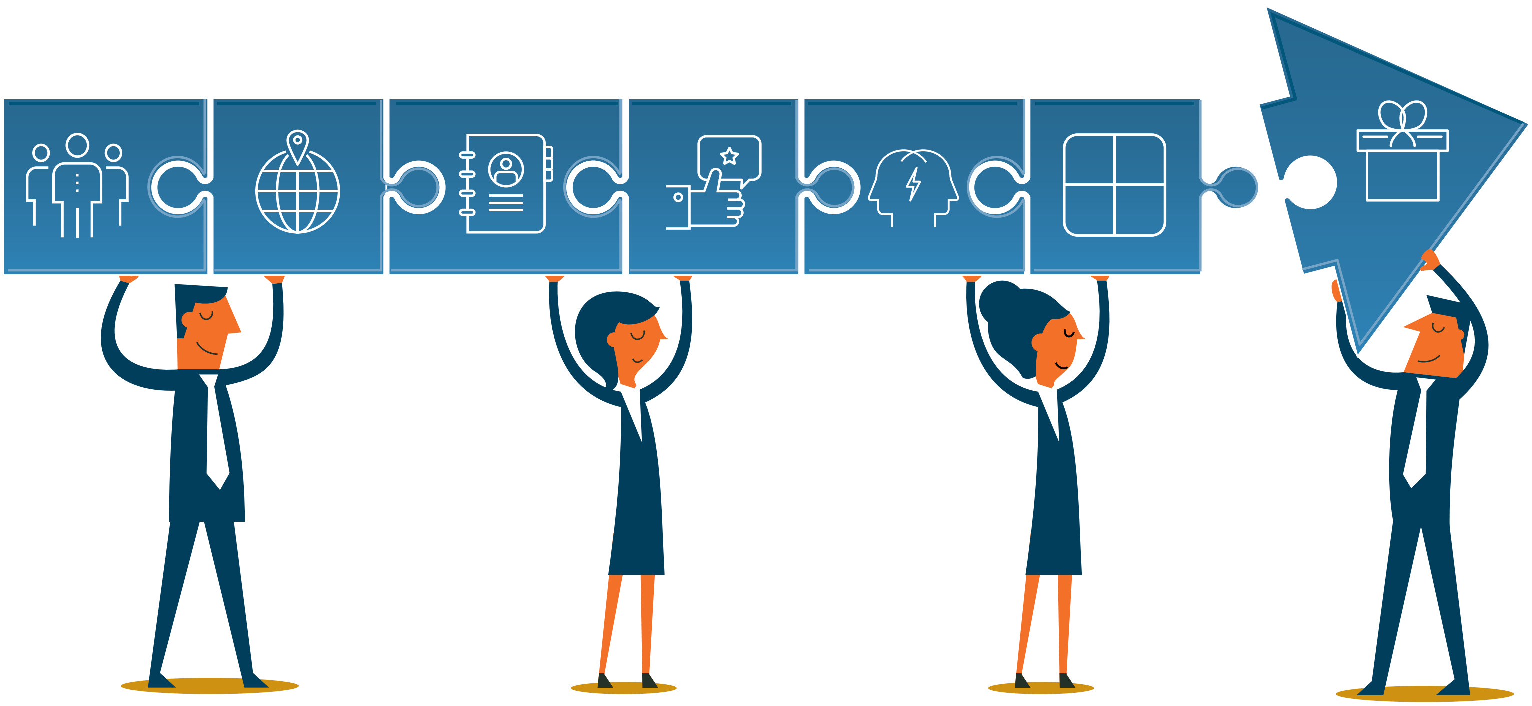
A NEWSLETTER FOR CLIENTS OF TROJAN PROFESSIONAL SERVICES, INC.



7 Tips for Successful Strategic Planning Meetings

by Laura Jamison

"You may be smarter than me, but you are not smarter than my whole team." When working with Dr. Jim Pride and Pride Institute, this sign sat on Dr. Pride's desk. It defined the culture of the Pride team.

Working with a team that supports one another and pushes each team member to be better every day is a WIN-WIN-WIN for the doctor, team members, and patients. To achieve this end, engage your team in an annual planning session.

Following are seven steps for the planning meeting that hopefully becomes an annual tradition.

continued on page 2 •••

continued from previous page

1. Require attendance of all team members.

Dress casually. Provide breakfast and lunch, and have food brought in. Consider giving the upcoming year a "theme" and providing small gifts to each team member to reflect that message. Use your imagination. For example, one year we designated "Dream Team" and everyone got an Orlando Magic Dream Team shirt. Another year was designated "Pearls of Wisdom" and everyone was given pearl earrings. Then there was "Diamonds in the Rough" and everyone received a diamond-shaped paperweight.

2. Get out of the office.

Rent a conference room, meeting room, or condo with a nice view, or meet at the doctor's home. (Doctors, meetings are a tax-deductible item. Check with your accountant.)

3. Have the agenda planned and printed.

Put the agenda in a binder with the other worksheets you will use during the planning meeting. Put a good picture of the team on the front of the binder. Have a flipchart for note-taking and brainstorming. Appoint a scribe to write ideas on the flipchart.

Have your team complete an internal and external SWOT analysis of your practice.

For a SWOT analysis, list:

STRENGTHS
WEAKNESSES
OPPORTUNITIES
THREATS
to identify the internal and external influences on your practice.

4. Review your accomplishments of the past year.

Before soliciting ideas for the future year's improvements, gather and celebrate your accomplishments. Ask team members to work on these lists before coming to the meeting.

Have fun with your celebration. Any accomplishment can be listed: i.e. new plants out front, hiring of a third hygienist, AADOM certification received by office manager, acquisition of new Prophy Jets. Celebrate the actions that got you to where you are today.

5. Begin brainstorming.

Have the team call out ideas for improvement for the upcoming year. Write each one on the flipchart. No discussion of ideas allowed during brainstorming. See how many ideas you can generate. Some ideas may not make the cut but are still worthy.

6. Divide the flipchart in quarters.

Each quarter represents a quarter of the upcoming year. Consider all the great suggestions for improvement and realize they can't all be accomplished in the first quarter. Prioritize what's most urgent and then create a quarterly calendar, placing the ideas in different quarters; and then ASSIGN each item to a specific person.

Complete the action plan:

- **WHAT** is the specific task or improvement to be accomplished?
- **WHO** will be responsible for seeing the task is completed?
- **WHEN** will it be completed and in place?

Finally, display this worksheet in a prominent place for the team to see daily throughout the year.

7. Express appreciation.

End the day with a bottle of champagne, a cake, or by presenting each team member with a small gift and heartfelt thank you.

These are quick and easy tips to enhance your Team Planning session. There is an entire science behind a successful planning meeting. Here's to your success and nothing less!

Laura Jamison *began consulting with Pride Institute in 1986, then spent 25 years in business on her own, Jamison Consulting. She has recently joined Henry Schein to continue providing business advice and team coaching. Laura is currently President-Elect of the Academy of Dental Management Consultants.*

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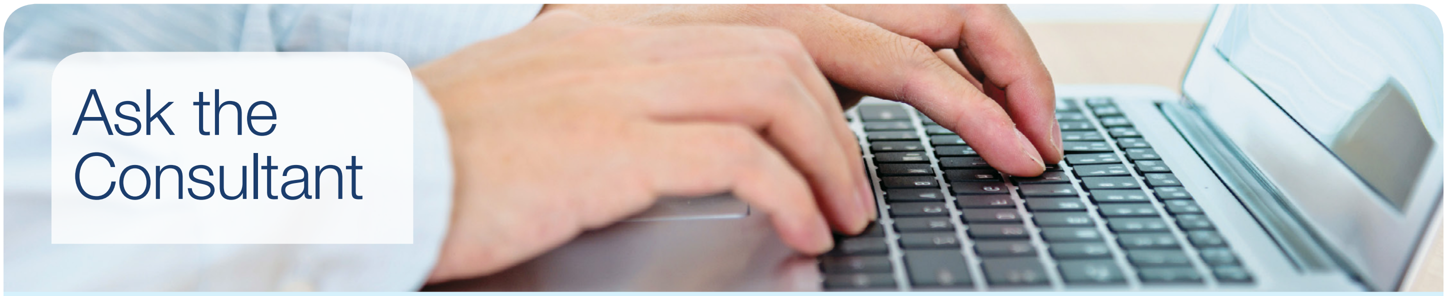
next page

previous page



Ask the Consultant

Q: When a patient has two insurances and the office participates with both, do we have to take a double write-off or does the primary dictate the fee?

A: When the doctor is a contracted Preferred Provider for both plans, s/he has to honor the contracted fee schedules. So, yes, it would be a double write-off.

Q: Our office accepts dual insurance. When preparing a treatment plan, we always use the primary insurance's fee schedule; however when processing payments, we always take the write-off indicated by the secondary insurance. Is this the correct way to process these claims?

A: Using the primary insurance fee schedule is the correct way to present the treatment plans. When you are in network with both plans, then you need to take the write-off indicated by the secondary.

Q: I understand there is a law in California that allows us to charge our UCR fee for procedures not covered by insurance. In other words, if the insurance plan covers crowns but not buildups, we charge the UCR fee for the buildup and the insurance fee for the crown. The patient must pay their portion for the crown and our UCR fee for the buildup. What are the restrictions and limitations on this law? How can I find out more about the law and how it is applied?

A: According to the California Dental Association (CDA), you can charge UCR for services not covered by the plan, such as teeth whitening. However, it does not apply to services normally covered. For more detail about the law, how it is applied, and any restrictions/limitations, go to www.cda.org; then go to CDA Compass; then to Dental Benefit Plans; and type in UCR.

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*Responses provided by **Kathleen Johnson**,*
President of Kathleen Johnson Consulting, Inc.

Remember...

Ask the Consultant provides a direct line to experts who offer advice on how to design an effective management program for your practice.

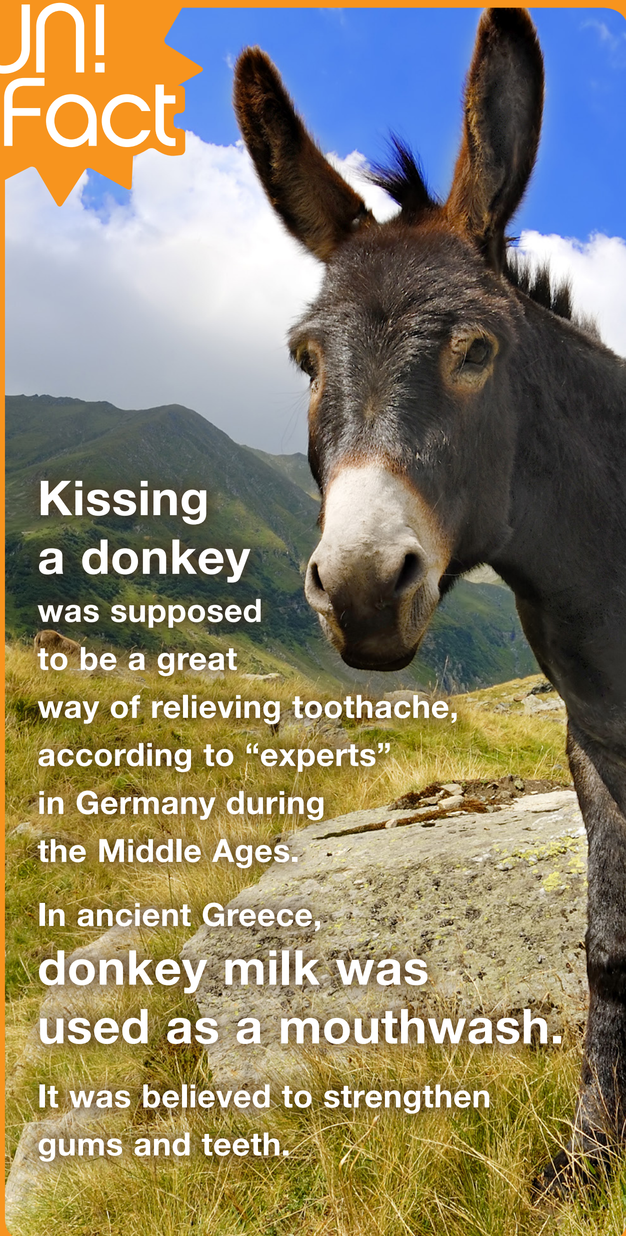
They can help you improve your image, create a more patient-centric workflow, and keep your chairs full by providing best practices and up-to-date information on how to run a successful dental practice.

Ask your question today:
www.trojanonline.com/services/ask-the-consultant

next page

previous page

FUN! Fact



Kissing a donkey was supposed to be a great way of relieving toothache, according to “experts” in Germany during the Middle Ages.

In ancient Greece, donkey milk was used as a mouthwash. It was believed to strengthen gums and teeth.

What Clients Say

“I have used Trojan Professional Services’ insurance software since it was on microfiche in the early years. It is a great tool for not only keeping accurate benefits up-to-date but also for marketing. I print out a list of different employers around my dental office and then go in and network with the employees, usually taking in some tasty sweets which helps get my foot through the door to the human resource administrator or manager. As well, I bring toothbrush goody bags and a copy of the printout from Trojan that explains their benefits in straightforward and understandable English. If you want to run more efficiently, invest in TROJAN.

— Ronda A.
Business Manager

Write for TROJAN TODAY

Share your dental and front office experience with others! Articles should be no more than 750 words. Include a short bio and recent photo.

Submit to: nikkim@trojanonline.com

Trojan encourages a wide variety of contributors and subjects to its newsletter.

Quote-Worthy

“You need to always lean into the future, when the world changes around you and when it changes against you. What used to be a tail wind is now a head wind; you have to lean into that and figure out what to do because complaining isn’t a strategy.”

— Jeff Bezos

next page

previous page

CHECK IT OUT!

Trojanonline.com has a new look!

Easier to use.
More helpful than ever!

Just a Friendly Reminder!

As the years go by and technology has changed, so has the way many of our clients perform the updates to their Trojan Benefit Plans. And, it is very important for our clients to perform these updates on a regular basis.

Many of our clients can download their updates through their high-speed internet connection, eliminating the need for a CD each month. Don't delay your access to the updated Trojan Benefit Plans. Most of our clients perform the updates once a week; many download them more often. Make frequent updates part of your routine. Do you have a morning huddle? Run the update while you talk. Do you have time set aside to catch up on messages, reminders to yourself, and follow-ups to make? Run the update during this time.

The CD's arriving every month served as reminders to do your Trojan updates. Now that many offices have installed the download option, some of you are forgetting to update. We have a few suggestions to help you remember to process your updates.

1. **Make sure the Trojan Communicator is always running.** It can be set to remind you each week to run an update.
2. **Assign a specific employee** to perform the task on a weekly basis.
3. **Use tools** like Microsoft's Sticky Notes on your desk top.
4. **Add updating Trojan to the checklist** for another routine office procedure.

Remember, the more often you update, the less time it will take.

If you have any questions or need assistance with the updates, please feel free to contact our Software Support Department at 800-451-9723 ext. 1, M–F, 6 AM to 4 PM (PST).

next page

previous page

TROJAN Closings

JULY 4, 2018
Independence Day

SEPTEMBER 3, 2018
Labor Day

Meeting Place

AADOM Chapter Meeting
Orange County, CA
JULY 11, 2018

Click here for more information or to become a member of AADOM!

Seminars

Front Office Rocks

Presented by Laura Hatch

JULY 27, 2018
Salt Lake City, UT

SEPTEMBER 21, 2018
Kansas City, MO

Click here for more information or visit: ***frontofficerocks.com***

Navigating the Dental Transition Minefield

Presented by Kathleen Johnson

JUNE 29, 2018
Costa Mesa, CA

Click here for more information or visit: ***Kjohnsonconsulting.biz***

Front Office Master's Program

Presented by Becky Gerber

JULY 26–28, 2018
Portland, OR

Click here for more information or visit: ***dentalpracticecareers.com***

Dental 2 Medical Billing

Presented by Christine Taxin

OCTOBER 4–5, 2018
Las Vegas, NV

Click here for more information.

http://bit.ly/FBTrojan
http://bit.ly/TrojanYT
http://bit.ly/TPSLinkedIn
http://bit.ly/TrojanGP

Accelerating dental practices to excellence by providing services that increase case acceptance, production, and collections.

TROJAN PROFESSIONAL SERVICES

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