

# **The Thriving Practice Playbook**

12 Systems Every Thriving Dental Practice Needs

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## The 12 Systems Overview

### 1. Daily Huddle System

15-minute morning meeting to align team on daily goals, patient cases, and priorities.

### 2. Patient Communication System

Consistent messaging via phone, email, and in-person about treatment, benefits, and scheduling.

### 3. Financial Management System

Monthly reporting on revenue, expenses, insurance reimbursement, and profitability by service.

### 4. Quality Assurance System

Monthly audits of clinical documentation, infection control compliance, and patient satisfaction.

### 5. Staff Development System

Ongoing training program for clinical skills, patient communication, and business acumen.

### 6. Patient Experience System

Standardized processes for scheduling, greeting, treatment experience, and follow-up.

### 7. Marketing System

Consistent patient acquisition strategy including referral rewards, social media, and community outreach.

### 8. Appointment Scheduling System

Optimized scheduling to maximize chair time, minimize cancellations, and reduce wait times.

### 9. Treatment Acceptance System

Consultative approach to explaining treatment, discussing options, and achieving patient commitment.

### 10. Technology Integration System

Proper use of practice management software, digital imaging, and electronic communication tools.

### 11. Inventory Management System

Tracking of supplies, equipment maintenance, and cost control to improve margins.

### 12. Leadership Accountability System

Regular reviews of metrics, team performance, and strategic progress toward practice goals.

## Morning Huddle Template: 15-Minute Agenda

Start every day unified. Use this structured agenda for your 15-minute team huddle before patients arrive:

### 1. Welcome (1 min)

Greet team. Set positive tone. Thank everyone for their focus.

### 2. Patient Wins (2 min)

Share a patient win or positive feedback from yesterday. Celebrate great service moments.

### 3. Today's Schedule (4 min)

Review patient list. Highlight complex cases, first-time patients, VIP patients.

### 4. Clinical Focus (3 min)

Dentist explains key cases. What should hygiene focus on? Any follow-ups needed?

### 5. Administrative Updates (2 min)

Insurance changes? New procedures? Reminders about processes or patient communication.

### 6. Team Goals (2 min)

Enrollment targets? Revenue goals? Recognition of who's leading. Motivational message.

### 7. Close (1 min)

Motivational word. Charge for the day. Everyone knows their role.

## Monthly Practice Health Scorecard

Track these 12 key metrics monthly. Compare to targets and previous months. Use data to drive decision-making:

Metric	Target	This Month	Last Month	Status
Total Revenue	\$_____	\$_____	\$_____	
Insurance Revenue %	<60%	____%	____%	
Patient Retention %	>95%	____%	____%	
Appointment Utilization	>85%	____%	____%	
Treatment Acceptance %	>75%	____%	____%	
New Patients Acquired	>8	_____	_____	
Cancellation Rate	<5%	____%	____%	
Membership Enrollment	_____	_____	_____	
Staff Retention %	>95%	____%	____%	
Patient Satisfaction	>4.5/5	_____	_____	
Operational Efficiency	80%	____%	____%	
Clinical Audit Score	>90%	____%	____%	