

Management and Marketing for the General Practice Dental Office

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The public has a general awareness that the aim of dental practitioners is to help patients maintain dental and oral health throughout life. In a Harris Poll, in May 2006, of United States adults regarding whom they trust most, dentists ranked near the top of the list among providers in all health care and non-health care related fields [1]. The degree of trust that patients have for dentists reflects the success of the patient-centered dental practice model; patients are included in the decision-making process regarding their own oral health. Marketing is the first step in patient education. As evidenced by the increasing number of new treatment modalities, including new technologies for minimally invasive and cosmetic dentistry, dentistry is a dynamic field in health care. Marketing the new techniques available in dentistry gives dental patients a greater range of choice and control over the care they receive. Furthermore, rather than focusing solely on one area of dental disease that may be the presenting the chief complaint, patients must come to see that optimal dental health is a year-round endeavor influencing systemic health. The Surgeon General's Report on oral health in the United States brought to the forefront data linking oral health and overall systemic health and correlating periodontal disease with low and pre-term birth weight [2]. The message of the Surgeon General from 2000 is just as true today. Reinforcing the message of the oral health and systemic link and the need for preventative and restorative care is part of the goal of proper marketing.

A good marketing message for a practice is targeted to a specific group of patients. Marketing should demonstrate the capacity of a practice to satisfy patients' specific needs. Dental practices that offer specific services in the

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areas of pediatric care, periodontal procedures, oral surgery, or orthodontics should highlight these areas as strengths of a practice through marketing. Many practices today emphasize offering cosmetic procedures, such as veneers and bleaching, because these often are key areas of interest among new patients as they have a dramatic effect on appearance and the psychological outlook of patients. Thus, each dental practice has an identity determined by the scope and strengths of a practitioner. Dentists continue to expand the scope of practice through continuing education throughout their careers, and marketing should reflect the new offerings of a dental practice. The best marketing of a dental practice highlights the unique characteristics of the practice. The level of experience of dentists in a practice, including any additional training attained, should be advertised. The hours of a practice, including any weekend hours, should be listed as patients are drawn to the convenience of additional hours of operation. Marketing a practice's identity—the skill of the practitioner and services offered—allows patients to understand how a practice fits their specific needs.

Managing a dental practice requires an understanding of marketing the services provided, which leads to economic sustainability for the dental practice. To have a more quantitative approach to the running of a dental practice, key performance indicators (KPIs) may be used by a dental practice to track the success of a marketing message. KPIs have long been used by businesses in non-health care sectors to gauge the financial status of a business [3]. General dental practice owners must understand whether or not the number of patients is increasing or decreasing and whether or not patients treated are having greater or fewer numbers of services provided. The financial success of a dental practice also depends on the remuneration provided by patients through dental insurance or fee for services delivered. Knowledge of KPIs, the vital signs of a dental practice, gives a practice owner a sense of the current financial health of the practice. In addition to the current state of a practice, the effect of all decisions made from hiring new employees to purchasing new equipment and treatment space may be gauged preliminarily through KPIs [4].

The mission statement and management plan

Strategic planning is an important part of guiding the direction of a dental practice. The formal plan for a practice is based on a global mission statement. The long-term practice goals should be written to include a practice's philosophy. The long-term goals also should include a vision of how a practice will be run when it is passed on to a future dentist or sold. The equity built into a practice is part of a successful long-term goal. In formulating a mission statement, a dentist should list general goals of the practice initially, followed by specific objectives in the immediate term. Statement of objectives should be in a clear and concise fashion, firmly establishing the goal to be accomplished. Foremost, objectives must be realistic and

achievable. The objective must be achievable within a prescribed time frame. Next, individual planned actions should be listed, such as increased marketing of certain areas of the practice. Strategic planning is an ongoing part of building a successful practice. Each quarter, the plan should be revised based on the degree of success of practice decisions made. A mission statement and the work ethic it embodies translate into a comfortable, positive clinic environment for patients. Such an environment leads to the most cost-effective marketing: word-of-mouth referrals. Word-of-mouth referrals are an invaluable part of any dental practice marketing plan.

A practice vision process (outlined previously) initially requires establishing a general vision, mission, and values of a practice. Such a vision might be to provide comprehensive care with emphasis on patient satisfaction with the esthetics of the smile while ensuring that the oral health of patients is maintained. The next step in the mission statement is to define key strategic goals. The methods for achieving the strategic goals are discussed next in the statement. Each quarter, the methods should be re-evaluated to determine if they have been successful.

The objectives, or KPIs, of the management plan should be measurable. For example, a practicing dentist may aim to increase the number of patients returning for periodontal maintenance therapy as scheduled. At least one indicator should be used that is measurable to ascertain the accomplishment of the objective [5]. In this case, the number of patients returning is a readily measurable quantity. The number of active patients seen in a dental practice is another KPI. Although many investments, such as investment in equipment, depreciate over time, increasing numbers of patients visiting a practice allows a practice to appreciate in value [6]. Not only do additional patients bring added value to a practice, they help to spread the word about the quality of the work performed at a practice through word-of-mouth referrals. Auditing the relationships a practitioner has with influential members of the community gives a sense of how a practice is faring in the intangible but important area of practice reputation.

Marketing objectives

Marketing objectives may span a range of purposes and should challenge dentists and staffs daily to work toward specific goals. The challenge of the stated objectives leads to a greater commitment to a practice. As shown repeatedly in studies, workers who are given specific goals work harder and have a greater sense of satisfaction in their daily work [7]. Objectives build practice unity by helping to bring all members of a practice staff together in seeking to achieve a specific goal. The challenges must be realistic but attainable. Acknowledging objectives as they are obtained gives the members of a practice a sense of accomplishment. Besides leading to a greater sense of fulfillment by staff, the focus on specific objectives leads to greater efficiency. When all members are working toward concrete goals, efforts are

concentrated and coordinated so that staff are not working against each other. Continued productivity is encouraged when members who are particularly successful at attaining practice goals are rewarded and incentives are given for goals that are achieved.

Marketing audits

The first step in a marketing planning process is conducting an initial marketing audit. Don Sheelen, Chief Executive Officer of the 100-year-old Regina Vacuum Cleaner Company, states, “a complete marketing audit is an absolutely essential step; without it, your chances of success are cut in half” [8]. The current methods of marketing should be compared with marketing methods known to be successful. An initial assessment should bring attention to areas that are deficient. Special attention should be given to areas considered critically deficient that have hampered the growth of a practice. Such areas might include poor communication with patients or staff. There should be common elements of courtesy extended to each patient, and all staff members should practice making patients feel comfortable from initial encounters to follow-up after discharge [9]. Ultimately, the best measure of marketing success is the level of patient satisfaction. Simple daily habits, such as asking how patients are feeling and thanking patients for coming in, may be the best way to retain patients and improve the patient experience.

An initial marketing audit captures the initial picture of a practice’s state. In a tightly knit organization, like a dental office, there are a few elements that have greatest impact on a marketing plan. Some of the key areas for the initial audit are establishing characteristics of the patient base and how patients are referred to a practice. Unique characteristics of the patients served and specific needs and services desired by these patients also are important. The expectations of patients are particularly important. The perceptions of patients should be described, including their attitudes toward the provided services, including cosmetic and other restorative services. Listed, in order, an initial audit should establish

- The patients served
- Key characteristics of these patients
- Characteristics that differentiate these patients from other patients
- Patients’ needs and wants
- Patients’ expectations
- Special requirements and perceptions
- Feedback on dental services and care environment
- Attitudes toward oral health
- Oral health, cosmetic, and dental needs

Success of a dental practice depends on patients feeling satisfied with the treatment options offered and the quality with which those services are

delivered. The patient experience extends beyond the dental chair, and the practice staff must be encouraged to foster a positive atmosphere of care for patients in all areas of a clinic. Staff members should be made to feel they are stakeholders in the success of the practice and that their conduct influences the manner in which patients view the practice [9].

Marketing objectives

James Quinn, in *Strategies for Change: Logical Incrementalism*, defines objectives as a statement of “what is to be achieved and when results are to be accomplished but not *how* the results are to be achieved” [10]. A marketing planning process begins with stating objectives of a practice. Marketing objectives state just where a dental office intends to be at a specific time in the future. Sheelen writes that objectives must be “measurable and office members must be held accountable to their specific goals” [9]. To be effective, objectives should be capable of measurement: quantifiable. The measurement may be in terms of numbers of patients, patient compliance and satisfaction, or financial indicators. An example of a measurable marketing objective is capturing 10% of the market for dental whitening services during 1 year. The bleaching techniques should be outlined in the objective and the expected results in terms of numbers of patients seeking the services should be listed. In addition, the income generated should be described. Marketing objectives include a dental practice’s financial objectives. Once quantified, the goal may be monitored unequivocally and corrections may be made as progress toward the objective is made. The objectives list which products or services are available from a practice and what is the desired penetration of the market for these services.

External and internal marketing

Once strategy and objectives are laid out, the process of implementation begins through marketing. Effective marketing of a dental practice is through a combination of advertising methods aimed at spreading the word about a practice within the community. Taken together, multimedia Web pages, magazines, and direct mail all may contribute to advertising but usually are not as effective individually as they are when used together. Targeting advertising is the most effective at attracting patients who have preidentified needs or desired procedures to a practice. Specific advertising methods and their advantages and disadvantages are outlined.

Informative and promotional pamphlets

A newsletter or promotional pamphlet may help a practice spread the word about services offered. A pamphlet describing the services offered

may be read by patients in a waiting room. Patients waiting to be treated thus may be informed about additional services offered by a practice. Patients who are waiting are a receptive audience for such informative material. Current information regarding office hours, new staff, and equipment purchased may be communicated to patients through pamphlets in the waiting room or sent by mail. The brochures may contain patient testimonials and pictures of successful cases, and citations of available research help to convince patients of the safety and efficacy of certain procedures. Patients should be encouraged to take brochures that have pictures of office staff and general information regarding directions to the office, telephone numbers, and the range of services offered with them to share with other potential patients. The disadvantage of published materials, such as pamphlets and brochures, is that they often are prohibitively expensive to produce.

Outreach

Some of the best advertising is through involvement of a dentist and staff with local and national organizations. Involvement in the community is a valuable form of networking. Educational seminars and lectures for community groups are another opportunity to advertise the work of a practice. Lectures given at hospitals, religious institutions, and clubs are a direct method of communicating with potential patients. Maintaining a list of attendees for an RSVP list allows follow-up with written promotional materials. There are a multitude of outreach activities that increase the visibility of a practice in the community. Donating time to help meet a need in the community also may lead to positive word of mouth referrals. Having a practice associated with such worthy causes establishes a link between the practice and positive efforts by the community.

Advertising in the telephone book

The best advertising in the Yellow Pages is through a simple but professionally designed advertisement. An advertisement should state clearly all information necessary to finding a practice. An advertisement should be attractive to potential patients and help patients find the office and know its hours of operation. All services of specific interest to the patients in the community should be displayed clearly in an advertisement. Hours of practice and forms of payment accepted by a practice are useful for patients in an advertisement.

Advertising in newspapers and magazines

A practice gains valuable exposure through advertisements placed in local newspapers and magazines. Targeting advertising to fit with the typical

audience for the publication ensures a receptive audience. A magazine about wedding planning is an excellent place to discuss cosmetic and esthetic dentistry, such as veneers and tooth whitening. Such advertisements often are expensive, however, and may be an addition to rather than a staple of regular advertising.

The Internet

The telephone book, a good source of self-referrals, no longer is the leading source of referrals for most dental practices. For most patients in the United States, the Internet is one of the first sources checked for information about local dentists. Patients use the Internet to retrieve information about practitioners. Patients during these times usually are investigating elective procedures, so establishing a presence on the Web not only attracts these patients during times when only an elective desire for dental services exists but also establishes a connection with patients for times of immediate need for dental care [11,12]. Well-designed Web sites may help dental practitioners accomplish many of the things essential to building a practice. Web sites may streamline administrative tasks, allowing for better patient follow-up and higher patient satisfaction. Much that is involved with patient registration and education may be offered through the Internet. A receptionist may direct patients to a practice's Web site before their initial visit.

Multimedia resources

Through Macromedia Flash and other computer programs, general dentists may create a variety of effective marketing presentations. These multimedia advertisements may be sent through e-mail or be displayed to patients during treatment planning sessions. Beyond the basic information about location of a practice and hours of operation, a presentation may inform patients about the availability of emergency care, scheduling procedures, and treatment planning.

Internal marketing

Internal marketing begins in the office. The atmosphere a dental practitioner creates within an office influences patients' perceptions of a practice. A practitioner and all auxiliary staff must maintain a professional and caring atmosphere in a practice. A memorable, distinctive logo that reflects the ideals of a practice is a symbol that patients find easy to remember when thinking about the practice. A logo may be used on stationery, prescription forms, invitations, uniforms, and all other forms of communication with the public. The cleanliness of a clinic and sterility of instruments is paramount to the perception of a clinic as well run. Informing patients about a practice's

Careful adherence to sterility guidelines is important to maintaining trust with patients. Insulate patients from the sounds of treatment rooms and staff conversations. Keep patients' information confidential, including keeping conversations private. Another area in which practitioners may gain trust with patients is through financial assistance with payment options and divided payment plans. Patient satisfaction and follow-through on treatment recommendations improves if patients have a choice of payment options. A staff member well versed in dental insurance matters may help patients obtain coverage. Treatment guarantees and free consultations can smooth the way for reluctant patients. Telephone, front-desk, and postoperative etiquette determine patients' view of a practice's responsiveness. Few things put patients off as much as being kept on hold; incorporate promotional information into messages when a short wait is necessary. Having a receptionist call before an appointment and with a follow-up makes a favorable impression. Create a log to keep track of patients' calls and what the calls are about. Try to make sure potential patients are not ignored. If necessary, send additional information to patients.

Employee relations

Choosing the correct employees is essential to the success of a dental practice. Staff must have the same vision as the practitioner and be capable of performing the necessary steps to attain it. They should be energetic and friendly, enjoy their careers, and be community conscious. It is important to adopt corporate management strategies in dealing with hiring and termination of staff. Poor hiring and termination practices can lead to high employee turnover on doctor stress. Consider employee manuals that adhere to state, local, and federal principles. Poor human resource skills may lead to lawsuits as a result of wrongful discharge, sexual harassment, or discrimination. Sexual harassment suits can ruin the reputation of the doctor, destroy office morale, and cost millions of dollars. They are not covered by malpractice or umbrella insurance. Do not hire family members, spouses, or friends as employees. They can be problematic in the future, difficult to terminate, and create employee problems. Consultation and summer help are exceptions. Doctor-employee relationships should remain just that. Inappropriate contacts, racial jokes, or commenting on attire or physical traits can lead to lawsuits. Do not manipulate monetary funds; in other words, do not try to avoid taxes. There should be some distance between a doctor's personal or family life and what the staff knows.

Specialty outlook

General dentists are responsible for the bulk of referrals to specialty practices even in today's wired world. Much of the focus for internal marketing

for specialists should be to maintaining and nurturing a healthy relationship with a general practitioner (GP). Approximately 60% to 95% of referrals are made by general dentists. Referrals from patients, dental specialists, medical practitioners, friends, allied health providers, health maintenance organizations, and staff contribute the remainder of patients to a specialist's office. The changing dynamics of dental marketing has created a new competitive market for dentistry. In this new age of competition, specialists need to understand this business end of their practice.

Marketing concepts

One of the critical elements in this business is the understanding and adoption of marketing concepts. Marketing concepts are straightforward; that is, to market a practice effectively, patients' needs and dentists' needs must be identified and understood and solutions developed that satisfy both. In a specialty practice, the perspective has to have the orientation that whatever is done, is done with patients in mind. This belief, that they are the center of marketing strategy, should be vibrant in every aspect of the business.

Working with a marketing consultant can be helpful when a practice has an objective of substantial growth or protecting business investment against potential attrition or loss of patients to more competitive marketing by other practices. A good marketing company is important because it can look at a practice in terms of strategic planning. Once specialists have their clinical skills in place and a practice is financially stable, it could be considered a smart move to recruit a consultant for the marketing aspects of practice building.

Referral levels are increased because a practice takes time to market effectively. It also is significant that a marketing program functions at several levels. Just look at how often a receptionist speaks to another receptionist at the referring office. If practitioners realize the incredible capability of staff and invest in their training, they can play a major role in marketing and communication process. Remember, GP staffs play an influential role in deciding where patients may be referred. It has been seen that four out of five GP patients ask a clinical question of a staff person. Certainly, many were, "Which specialist is the best?"

Set up a calendar for the year to plan out all marketing programs. Analyze each program to be sure objectives specified in the marketing messages can be met; by establishing a plan, each phase of a marketing program can be prepared for. Coordinating with staff and gaining momentum for the program help increase the chances of the program's implementation. A fixed amount of finances should be set aside to be used for marketing, because having a fixed dollar amount creates a feeling of responsibility to spend that money. A staff member should be identified who is responsible for performing the marketing program. Staff should be engaged in staff marketing.

Establish a budget for the receptionist to take other receptionists to lunch or send fruit baskets or flowers to GP staffs in appreciation. The ability to involve staff and assign specific individuals responsibilities in planning a marketing program is a powerful team-building tool and enhances the marketing effort.

The goal of all marketing is to have an effect. The dynamics of specialty practice marketing continue to evolve. As diagnostics and treatment modalities become more integrated between a GP and a specialty practice, future marketing focuses more heavily of the cohesive team-oriented relationship. There are many examples where orthodontics, oral and maxillofacial surgery (OMFS), implant surgery, and medical specialties must be coordinated. Orthognathic surgery requires OMFS, GP, and orthodontist coordination. Implants require the OMFS, GP, and laboratory personnel in most cases. There are cases where an OMFS sends a patient back to a GP for final esthetic enhancement or occlusal therapy. To enhance long-term relationships, a specialist should be as specific about the needs of each office as possible. Specialists and GPs should try to know each other by knowing more about each other's interests. This promotes welcome conversation on the telephone or in person. People love to refer to their friends, and friends have an interest in one another.

One excellent strategy for following-up on the success of a marketing program to referring offices is to continuously assess the generalized impact. The OMFS should make it a point to ask referring dentists in various settings if the OMFS practice is providing service commensurate with the needs and desires of the GP. It is worthwhile to encourage staff to occasionally ask the staff of the GP the same types of questions. By discovering a problem early via a marketing follow-up process, there is an excellent chance to solve the problem before a general dentist begins to refer elsewhere. Remember to target marketing for the accomplishment of specific goals. Each month or year, a different set of marketing strategies can be used with the underlying principle that all contacts with GPs are of a highly positive nature. Do not make the mistake of waiting until a practice has slowed down to begin marketing. As competition increases for specialty services, it is important to keep a specialist's message clearly at the top of a GP's mind.

One area that has increased productivity for many specialist practices is dental implants, especially for oral surgery. Some OMFS practices have set a goal to increase referrals for implants. One of the strategies they use is study clubs. A specialist can start or sponsor evening courses ranging from implant placement to home care hygiene for implant patients. There are many people who enjoy speaking at a study club. The key to a successful study club is finding someone who can take responsibility for organizing and perpetuating a group. Furthermore, staff can be involved in helping to get a study club to work. They would enjoy interaction with a GP and the excitement of implant emphasis. The GP's staff can be invited to meetings they might enjoy. GPs can be invited to seminars sponsored by specialists

with help of an implant company representative to expose referring dentists to surgical and restorative techniques. These could be cosponsored with a dental laboratory. Special forms for implant referrals forms can be created and distributed to every potential dentist, making referral easy and convenient. Various strategies should be defined and implemented to reach a patient population and to position a practice in the competitive market.

Successful management and marketing of a dental practice requires a systematic process of setting objectives, auditing KPIs, and drawing new patients through advertising. The range of treatment choices offered by dentists is growing and patients are seeking an increasing number of elective procedures. Keeping patients healthy and happy is the best method to promote a successful general dental practice.

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