



PRESIDENT'S PERSPECTIVE

Several years ago Ortho2 started talking about and developing a slider proposal presentation feature to better aid in case presentation and patient acceptance. While this project took much longer than originally anticipated, I am pleased to say Edge Proposal is almost here!

Setting contract terms has never been easier than with Edge Proposal. Set contract parameters such as minimum initial payment, maximum payment plan months, and finance charges within Edge Cloud. Then turn your responsible parties loose with the easy-to-use interactive sliders.

Responsible parties can select from one of the available treatment options such as Invisalign or traditional braces. Additional charges like retainers, clear brackets, or any other optional add-ons your office provides can also be included in the total. Responsible parties can adjust the initial payment and monthly payment sliders to fit their financial needs. This can be done in your office or from the convenience of their own home. Once they click accept, a summary is sent to the responsible party and the contract terms are seamlessly applied directly within Edge Cloud.

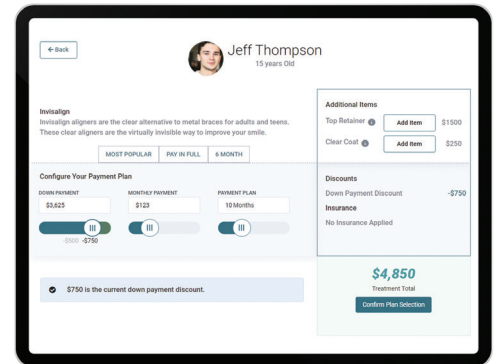


Getting commitments from your patients is now as simple as Edge Proposal.

Edge Proposal has been through the beta testing process and is currently being used by early adopters.

We will continue a phased roll out in the coming weeks. If you'd like to request earlier access, send an email to admin@ortho2.com.

Additionally, we are putting the finishing touches on information about how to set up and use Edge Proposal. This information will be in your Edge Cloud help menu by searching for Edge Proposal and on support.ortho2.com > Product Help > Visual Help > Edge Cloud > Contract Proposals as soon as it becomes available. ☺



Amy Schmidt

Amy Schmidt, Ortho2 President

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SEEING INFORMATION WITH VISUAL TAGS

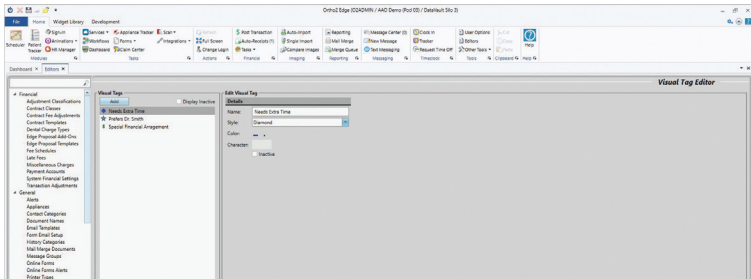
Edge Cloud was designed to be customizable to your office and your needs, and a perfect example of this is visual tags. Visual tags consist of user-defined shapes and colors that can be used to ‘tag’ a record for classification or subgroup purposes. They can be created and assigned to patients and responsible parties. Visual tags can be seen in the patient record, responsible party record, Patient Tracker, Post Payment window, and on appointments in the Scheduler.

Dr. Kervin Mack, Orthodontist at Mack Orthodontics in North Carolina, said he uses visual tags in a variety of ways. One specific tag he uses, a green ‘A’, is for patients who are anime fans. “You can easily create a subgroup that prompts you to select the visual tag, and I can pull up every anime fan in my practice and send them a text to announce that the next episode of Jujutsu Kaisen posted early,” Mack said.

Mack said they use visual tags to know which patients only speak Spanish, need extra care, or may even occupy more time than expected all before he sits down with them. The uses of visual tags are endless. Other ideas include special financial arrangements, prefers Dr. X, or to track appliances.

Creating Visual Tags

In Edge Cloud, open your Editors and select Visual Tags under the General heading.



Click Add at the top of the Visual Tags list to create a new tag, or select an existing tag to work with.

Once you have a tag selected, you can edit the name, style, and color. If the style you select is Character, type the keyboard character you want to use in the Character box. Once you create a record, you cannot delete it. You can, however, flag it Inactive. Inactive records remain in your system, but cannot be applied to any new records.

Click Save in your Quick Access toolbar or File ribbon bar to save any changes you have made. There are many places where you can implement visual tags in Edge Cloud. Review the Visual Tags visual help video at support.ortho2.com > Product Help > Visual Help > Edge Cloud > General > Visual Tags – Using Unique Identifiers to Classify Patients to learn more. 📄



THE 2022 USERS GROUP MEETING HAS BEEN
POSTPONED

SAVE THE DATE
FEBRUARY 23-25, 2023

It was with a heavy heart that we had to postpone the 2022 Users Group Meeting due to the state of the COVID-19 pandemic. This decision was very difficult for us to make, but we felt it was our corporate responsibility to keep our entire Ortho2 family safe, including our customers, speakers, exhibitors, and employees.

Please mark February 23-25, 2023 on your calendar to join us at Planet Hollywood in Las Vegas for the next Ortho2 Users Group Meeting. More information will be sent to you this fall. Let us know you are interested in the 2023 meeting by visiting ugm.ortho2.com and filling out the form.

EDGE CLOUD DASHBOARD: THE GATEWAY TO YOUR PERSONALIZED DAY

When you log into Edge Cloud, the first thing that appears is the dashboard. This feature is one of the more underutilized tools we find our customers using. It makes sense because it takes some time to understand the power the dashboard can deliver, and the information you want to see. Use the dashboard widgets to display the productivity issues and applications most relevant to your tasks and professional goals.

Use the widgets that make the most sense to you – whether it's following a chart to stay up-to-date on goals in a glance, reviewing your task list, or staying on top of your patients coming in and out of your office. To get you thinking about what you might like to see on your dashboard, review some of the most commonly used widgets that our trainers see.

Dashboard Widget Options

Browser. Use the browser widget to view various websites. The marketing coordinator might have social media sites pulled up, or the insurance coordinator could have insurance websites pulled up to verify benefits. Click the wrench icon in the widget to type in the web page you want to see when you open Edge Cloud.

Chart. The chart widget can show you a variety of practice statistics that are customizable. These charts show patient information including charges vs. receipts, new patient exams made, referrals, total AR vs. past due 30, and more. Simply choose what you are interested in seeing, how you want to see it, and let Edge Cloud update you each time you log in. You can have more than one chart widget docked on

your dashboard with different statistics showing on each.

Office Contacts. Use the office contacts widget to have immediate access to the contact details of the businesses and suppliers you work with on a regular basis. This widget lists the company name, contact name, and contact information for each active record in your Office Contacts editor. You can click the Edit icon to open the Office Contacts editor to view additional details, make changes, and even add new contacts to your list.

Practice Monitor. View the practice monitor widget to see real-time statistics and progress toward your practice goals. Choose from a list of data, set your goals, define parameters such as time frame (weekly, monthly, annual), orthodontist, and office, and you are set! We have seen offices use this widget to monitor new patient exams or new patient starts. Just as in the chart widget, you can have multiple practice monitor widgets showing at the same time.

Quick Reports. You can use the quick reports widget to organize and run your most frequently-used reports and patient forms without opening the Reporting window. From the dashboard, simply click the report you want, then click Run.

Stacks. Use your stacks widget to flag patients for further action. When you find yourself needing to complete additional work for a patient at a later time, simply add the patient to an appropriate stack folder, or add the patient to someone else's stack. When you have finished the activity, you can remove the patient from the stack. Insurance coordinators might use stacks to track which patients they



need to submit a claim for. You can also use stacks to show your orthodontists a list of patients who need a treatment plan created.

Subgroup. As many Edge Cloud users know, subgroups are the best way to get a subset of patients that meet a defined criteria. Set up any subgroup, and use the widget on the dashboard to see that specific list of patients. Ideas include:

- Create a subgroup to look for specific upcoming appointments, should anything need done prior to the appointment.
- If paperwork needs printed before start appointments, you might use a subgroup set up to display any patients coming in (tomorrow, next week) for a start appointment.
- If you personally call new patients to remind them of their new patient exam (as opposed to using an automated reminder), set up a subgroup to display new patients coming in 'x' number of days to know who to call.
- If you verify that appliances are in office prior to a delivery appointment, set up a subgroup to display upcoming delivery appointments.

Tasks. In the tasks widget, you can assign, prioritize, and track essential office activities. Use this widget for helpful reminders of items you need to complete.

Setting Up Your Dashboard

Now that you have an idea of what some of the widgets are, to use them, simply open the Widget Library ribbon bar. Then, from the Application section, choose the widget you want to work with, and select to open it as a Dashboard widget type. The widget appears in its own window on your screen.

The other option is to use a widget as an application. Selecting Application opens the widget in a new window, making it movable across multiple monitors. Many users have the Patient Tracker and Light Bar widgets on a second monitor or docked within their Edge Cloud software.

You can display the active panels in either normal or

expanded view. When in normal view, all panels are given the same amount of screen space. When in expanded view, a single panel is given the maximum amount of space, and all other panels are collapsed. To work in expanded view, click the box at the upper-right corner of the panel you want to work with, or double-click the panel header. To return to normal view, click the box, or double-click the panel header again. Certain information and features are available in expanded view only.



Dashboard Widget Tools

Use the icons on the widget tool panel or header to float, refresh, and close the widget, and to define the widget settings.

- **Close a Widget.** Click close to remove the widget from your screen.
- **Float/Pin a Widget.** Click float on the tool panel of a dashboard widget to make it an application widget. You can then resize the widget window, and drag it anywhere on your screen, even onto a second monitor. You can drag a floating, or application, widget to an arrow on your dashboard to pin it in place. Dragging a floating, or application, widget to the center arrows places it on your dashboard.
- **Refresh a Widget.** Click refresh to update the widget to the most recent data.
- **Widget Settings.** Click settings to open the settings for that widget.

We strongly recommend taking some time to think about the information you want to see at a moment's notice and then open the appropriate widget on your dashboard. To learn about all of the available dashboard widgets, search for Dashboard Widgets in your Edge Cloud help menu. ☺

IMPLEMENTING DIGITAL
PATIENT WORKFLOWS

NOW HIRING

Let’s talk about the digital workflow in your practice, which should include steps for implementing the digital workflow through each position, what different modalities bring to the digital table, and why they might be right for you. I will be providing you steps to wrap your head around embracing this revolution in orthodontics that will only continue to put pressure on our industry, and will be driven by new patient preferences, motivating drivers, and expectations.

To start, you should be asking yourself questions that need to be addressed within the practice as you move forward and what this changing world will require from you to adapt or be left behind in the potential growth of your practice, as well as surviving against the external pressures facing all of us today.

Digital systems and virtual care is changing everything from how practices build and maintain teams, job descriptions within a practice, and what qualifications and professional skills doctors need to look for in today’s candidates. Let’s look at an effective layout to how this is done successfully, fully capitalizing on the benefits of this added arm within your business, minimizing the possibility for errors, truly enhancing your patients’ experience, and simplifying your processes.

A digital business model is a form of creating value based on the development of patient/customer benefits using digital technologies.

Wherever your practice is along this curve of implementing digital workflows, we do recognize that our industry has been shocked into the need for more digital options throughout the past 20 months. We, as a group, seem to be slow to accept this into our practice, and at times defiant despite the facts that show the benefits.

There are more options available to our patients than there ever have been. From DIY to general dentists that have the ability to erode our patient base, you might question how you can compete in today’s marketplace as a practice owner.

I challenge anyone not yet adopting digital patient flows to at least start to ask yourself these questions:

- How can I serve my patients better where they are?
- How can I have more TIME for my personal life?
- How can I continue to work smarter and make a profit?
- Why am I resistant to the new technologies and modalities?

Answering some of these questions will set you on the road to finding answers and solutions that fit you and where you need to be going.

When implementing a digital patient workflow into your practice ensure that you have clearly defined roles for every position. Understanding and writing out clearly defined roles and expectations will also give you a clear picture of your staffing needs and requirements. Technology and new products entering the industry will provide opportunities not only to treat our patients’ needs better, but to also reimagine our staffing needs and skill sets that have the potential to significantly reduce our stress regarding staffing, and provide reimaged flexibility to the positions.

Another important step in creating a successful process for your digital patient workflow is to understand the WHY and the WHAT for the practice. You need to ask yourself the questions:

Digital Workflows continued on page 14

About the Author



Michelle Shimmin is an international lecturer, trainer and consultant who has been in the field of orthodontics since 1990. She helps transform orthodontic offices on their systems to promote training, growth, and success through a comprehensive practice approach.

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Everywhere you look you will find signs saying, “Now Hiring” in stores, shops, restaurants, businesses, medical/ dental offices, and an increasingly number of orthodontic offices.

I’ve seen signs that say, “Please be patient today as we are short-staffed while people sit at home enjoying their stimulus checks. And be extra kind to those who showed up today to serve you.”

There seems to be a shortage of people wanting to commit to working outside the home, making the long commute, showing up for a scheduled work week, and getting back in the game since the pandemic.

The pandemic declaration was announced on March 11, 2020, the California shutdown followed on March 19, 2020, and from there many counties and states set up new restrictions nationwide.

Many of us in healthcare were forced to stay home from work. During the next 18 months, we found new ways to work from home, home-school our children, or supervise Zoom education. Even when we closed our friendly reception rooms, offered new online check-in procedures, installed air purifier systems, and suggested virtual appointments, many team members could not come back to work while their children were at home.

Now that we have raised the bar for safety precautions (empty reception rooms, temperature checks, and COVID release statements) in addition to new sterilization protocols, patients and parents are happy to return to the office and get started with their orthodontic team members. Conversion rates are up for many orthodontic offices. But where are all the team members?

During these times of uncertainty, people tend to behave more conservatively. The pandemic has shifted our perception of what norms are making us question what is the norm now in my life? We are willing to experiment with new norms, new ways of working, a new work-life balance.

So, what are people looking for?

- Less stress
- Less commute times
- Less full-time work: more flexibility to continue to be with our families as we were the past 18 months
- More meaningful work; something to be passionate about
- More connection and communication
- More appreciation for the job that we do

Interesting enough, it is not about more pay or promotions, although I would encourage you to review salaries and consider some increases as well as reviewing your benefit package to retain employees.

People have had time to reflect on their quality of life, stress levels, family values, and to some degree, the meaning of life. They want flexible work schedules, more time with family, more time to engage and be present for their children, and less stress of commuting and demanding jobs.

In August 2021, 4.3 million Americans left their jobs. According to a Microsoft survey, 41% of the global workforce is considering resigning from their current roles; 95% of workers are considering a job change according to Monster.

This is now being called The Great Resignation and instead of people competing for jobs, companies are now

Now Hiring continued on page 14

About the Author



Carol Eaton has been actively involved with the dental/orthodontic industry for more than 48 years, with a strong background in management and leadership. Her approach to teaching new skills and sharing updated information is done in an uplifting coaching style.

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THE PURSUIT OF EXCELLENCE: A JOURNEY...NOT A DESTINATION

How long? It is our bemoaning cry since the time we were young. “How long until we get there?” “How long do we have to do this?” We may believe we will outgrow the urge to utter, “How long?”, but thanks to our innate human nature it is a permanent question.

Think about the question we hear, “How long do I need to wear my retainers?” I love our standard response, “As long as you want to keep your teeth straight.” Our response results in teenagers with mouths agape and eyes bulging as they hear the need for a long-term regimen.

We wonder how they could ask such a question that seems so obvious to us in the field. But the same thing could be said of us as leaders if we treat excellence as a destination to be checked off instead of a lifelong journey to be traversed.

Excellence is a Journey

Excellence is not a noun as if an “x marks the spot” on a map. It is a verb. It is the journey of habits.

But all too often we inadvertently treat it like an event, a task on a list, or a course to finish paying for. We think by sending a team member to a course, purchasing a continuing education event for the team, or hiring a one-day trainer means we can say “DONE”. But becoming excellent doesn’t happen that way. As Aristotle says, “Excellence is a habit.”

It is why we can go away to a course and return with great enthusiasm; the pearl we gained can feel like the magic bullet we have been waiting for. We present it to the team, drop the mic, and walk away. But all too often we can be faced with the knowing nods and overhear watercooler whispers that feel like an omen. It is the omen of don’t worry – just wait a few weeks and the doctor will be done with it and things will get back to normal.

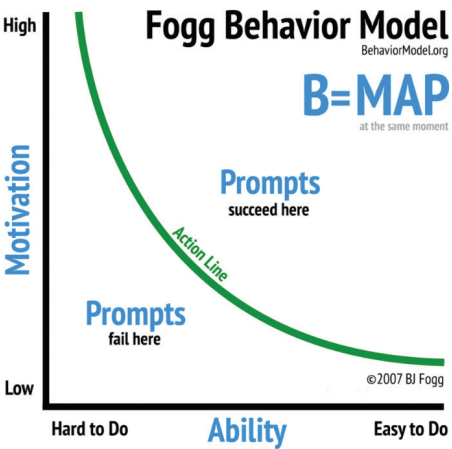
Or, it is another scenario where we hire a consultant for a period of time. We ask, “How long until we’re done?” And then when the terms run out and the control routines are put up on a shelf, we wonder why it didn’t work and think about moving on to the next great idea or provider.

Effective Habit Work

What we need to do is pause and learn a bit about habit formation and deterioration. I would encourage you to add four books to your reading list. They are:

- *Tiny Habits* by BJ Fogg, PhD
- *Atomic Habits* by James Clear
- *Mini Habits* by Stephen Guise
- *The Power of Habit* by Charles Duhigg

Take a look at the Fogg Behavior Model (used with permission).



What the model shows is the Behavior (B) is the convergence of Motivation (M), Ability (A), and a Prompt (P). Our goal is to prompt behaviors ABOVE the action line – or as Dr. Fogg says, the “happy line”.

This means the more motivated one is to do a behavior, or the easier it is to do, the more likely it is for the behavior to occur when prompted because it is above the action line. And conversely, the less motivated or the harder the behavior is to do, the less likely for the behavior to occur because you will be below the action line.

This is exactly the principle used when Stephen Guise talked about the one push-up challenge in his book listed above. We are talking about making small repeatable habits that we can succeed in doing.

This contrasts with grandiose ultimatums, aka New Year’s Resolutions, that we may do on day 1 but by day 14 we are wavering in.

Behaviors are Different from Goals

Behaviors are the action items we do to help us reach our goals. The reason we work on behaviors is because of the motivation factor. As Dr. Fogg states, we must outsmart motivation because it rarely stays high. And, we must make those behaviors easier to do to ensure they end up above the action line.

Listen up. I am not saying to set the bar low. I do want you to set great stretch goals for your practice. Create goals for production, collection, missed appointments, and the like; just be sure to understand that those are not behaviors.

For your individual team members, these practice goals can sound more like platitudes and things they do not have a direct impact upon. You may even feel you have broken down goals to the role level, but it can still be platitudes if they are said like this:

- Be nicer.
- Be more productive.
- Connect more.

We have to have a behavior that we can DO and it must have a prompt so we are actually triggered to do it. Let’s look at two scenarios and design a desired behavior that gets them above the action line.

Phone Rings

This happens countless times in each office. I can tell you from the 15,000+ calls I evaluate each year, that offices are generally good at repeating the office’s standard greeting. But rarely are we seizing the opportunity to knock their socks off with a stand-out first impression. We are so head’s down into our business that we jump straight to asking for their name or date of birth.

So here it is.

- Prompt: The caller tells you why they are calling.
- Behavior: Immediately respond by saying, “I would be

happy to help you.”

Easy. Done. Caller pleasantly surprised. Repeat!

Talking Finances in a New Patient Exam

Treatment coordinators have the important role to close the sale. They must discuss finances. Many quickly dance through financial options and retreat from the topic. It is as if the topic is a hot potato. So how to we ask for a small level of commitment?

Here is the setup.

- Prompt: When finishing walking through the standard financial options.
- Behavior: Immediately ask, “Which option works best for you and your budget?” and then be silent.

We learn something. We will either determine how they wish to proceed on finances or begin to uncover an objection that we can then address. Valuable!

...Your Turn

Due to space limitations, we do not have time to walk through more. But to get you going, think of these scenarios and the behavior(s) you may wish to have:

- Encouraging a same day start
- Setting appointments
- Patient has additional siblings present at a visit

Pursuit of Excellence continued on page 15

About the Author



Amy Demas is the President of Communicate Excellence, a consulting firm specializing in the training and coaching of your team from front desk and TCs, to full teams and leaders. She is the author of *Communicate Excellence: A Guide To Authentic, Positive, Consistent Front Desk Communication*.

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INSIDE ORTHO2

Information about the people of Ortho2 and the resources available to you as a member

VISUAL HELP ROUNDUP

If you haven't taken the time to review the visual help videos on our website, now is a great time to do so! There are a variety of topics that you can choose from – ranging from a quick overview to a full in-depth explanation.

Each quarter we'll highlight a set of videos so you can become familiar with the content that is provided to you. This quarter features videos about the patient record and an Edge Cloud overview. The videos in this section cover everything you need to know to get started using Edge Cloud and the ins and outs of the patient record. Some of the videos include:

- **Edge Cloud System Overview:** This video is a brief summary of the main toolbars and screens in Edge Cloud.
- **Adding a New Patient:** Learn how to add a new patient into Edge Cloud.
- **Responsible Party Record:** Review what is included in a responsible party's record and how to edit it.
- **Milestones Panel - Appliance Tracker:** Learn how to use the Appliance Tracker to track the status of patient appliances.
- **Correspondence Panel:** Explore the Correspondence History and how documents get added to it.

If you have a topic you'd like to see covered in a Visual Help video, email ortho2support@ortho2.com.

LOG INTO SUPPORT.ORTHO2.COM

There are many resources available to you on our website. You will find visual help videos, printed documentation, request forms, information on upcoming meetings, and more.

If you haven't already created an account to access the Customer Site of our website, you will need to do that. Each doctor and staff member can create their own account. Visit support.ortho2.com, and click Register New User under the Login fields.

You will be prompted for your full name, main office phone number, and Ortho2 customer number. Finally, enter your individual email address, a password of your choice (at least five characters), and a display name that will be publicly visible.

CHAT SUPPORT

Do you need to call into our Support Team for a question, but it's difficult to wait on hold, even for a few minutes? Ortho2 has you covered! Use our chat support to get in contact with us. When you use the chat support feature, you will be added to the same queue as phone calls. You can choose to chat with the Software Support, New Customer Care, or Network Engineering Teams.

In Edge Cloud, you can find links to chat support through the Help menu. In ViewPoint, click the Help button in the bottom right of the Daily Activities menu.

CAREER MILESTONES AND DEVELOPMENT

Welcome back, **Jesse Howard**! Jesse joined the New Customer Care Team as a New Customer Care Specialist on November 15. Jesse stepped away from his Ortho2 Senior Regional Manager role in July 2020 to focus on his health. We are excited that he is healthy and back to Ortho2 World Headquarters.

Join us in welcoming **Christopher Clevenger** to Ortho2! Chris joined the Network Engineering Team as a Network Engineer on December 6. He recently graduated with an Associate of Science degree in computer and information systems. Glad to have you on board, Chris!

Zach Benjamin joined the Software Support Team as a Software Support Representative on December 6. He is a recent graduate from Iowa State University with a Bachelors of Industrial Design. Please help us in welcoming Zach to Ortho2!

SERVICE EXCELLENCE

We invite you to recognize Ortho2 employees by completing an Extra Mile card. Simply fill one out online by going to www.ortho2.com > Our Company > Contact Us. Our goal is to uphold our tradition of excellence in customer service, and with our Extra Mile program, you can let our employees know when you appreciate their extra effort. We encourage you to send an Extra Mile card whenever an Ortho2 employee goes the extra mile for you. The recognition is valued by the recipient and is acknowledged by our management team. We continue to look for better ways to serve you. Thank you for helping us recognize excellence.

SUPPORT

By Phone: 800.346.4504

Available 7:00 A.M. – 7:00 P.M. Central Time, Monday – Friday

By Email: ortho2support@ortho2.com

Response time is usually the same day or at most within 24 hours.

And Don't Forget Our Website: support.ortho2.com

Our website gives you 24/7 access to our knowledge base, white papers, visual help videos, and more.



INSIDE ORTHO2

Information about the people of Ortho2 and the resources available to you as a member

MEET THE TEAM – INTERNAL SERVICES

The Ortho2 Internal Services Team does more than just facilitate our internal projects and our customer database. They also coordinate and complete conversions and custom projects for our customers. This quarter, we are featuring Data Conversion Specialists Nathan Hemmings and Jorge Rios.

What do you really do here at Ortho2?

NH: The name of the game is ETL – Extract, Transform, and Load. I am part of the team that develops, maintains, and runs custom, in-house software to Extract data in various forms and formats from legacy and third-party practice management software, Transform that data into a format that Edge Cloud can work with, and Load it into databases so our customers don't have to move all of that data by hand.

Additionally, I program custom reports for our ViewPoint users, custom cephalometric analyses for our SmartCeph users, and custom web forms for our Online Forms users.

JR: I create custom forms when requested. I also help convert new Edge Cloud users' existing data from their current existing practice management software to Ortho2 Edge Cloud.

What's fun/what do you enjoy about your current job?

NH: I take great satisfaction at being presented with a new feature that our tools don't currently support and

developing a brand new solution to integrate it into our conversion process. As our team has grown in recent years it has also been rewarding having time to further optimize and improve on existing processes, providing shorter conversion times and better optimized data to our customers.

JR: There's always new challenges, which keeps everything fresh. That said, my coworkers are awesome!

What do you want our users to know about the Internal Services Team?

NH: We work hard to make sure we are continually adapting to the changing needs of our customers and their software. In addition to evolving our tools to keep pace with updates and enhancements to Edge Cloud over time, our team also tackles the challenge of new and changing versions of data brought to us from third-party software. We're aiming at moving targets on both sides of the process, and hitting the mark.

JR: We're always working to improve our processes, which should translate into a better experience for our users.



Nathan Hemmings

Vacation destination: Hawaii. I'm blessed to have gone three times, and I can't wait to go back.

Three people I would like to have dinner with: Nathan Fillion, Isaac Asimov, and Albert Einstein

My role model: Kyle Hill

I can't go a day without: Caffeine. How is anyone's answer to this question not always caffeine?!

What are you listening to right now? My space heater; my home office is very cold.

Favorites

Team: What is sports?

Food: Burritos

Movie: *Emperor's New Groove*

Book: *Conquerors'* trilogy by Timothy Zahn



Jorge Rios

Vacation destination: I'd like to tour Europe, attending soccer games

Three people I would like to have dinner with: Gordon Ramsay, Albert Einstein, Pro Wrestling legend Eddie Guerrero

My role model: I don't have one

I can't go a day without: Gaming

What are you listening to right now? 90s Rock

Favorites

Team: Iowa State Cyclones

Software Program: Streamlabs OBS

Movie: *Halloween*

Book: *Harry Potter and the Chamber of Secrets*

Phone App: ESPN

REFERRAL REWARDS

You can earn a \$500 credit for each referral that results in an Ortho2 system purchase within six months. You can apply the credit toward any current or future charge or purchase—it never expires. We frequently hear from doctors that they wish we had contacted them before they purchased their current system. We wish we had too, but we didn't know they were looking. You can help us help your colleagues by letting us know when they are considering a change in systems. Enter referrals online at www.ortho2.com > Our Company > Referral Rewards, or call 800.678.4644.

ORTHO2 ANNIVERSARIES

Congratulations to these Ortho2 staff members who celebrated anniversaries during the fourth quarter of 2021.

Twenty-Nine Years

Todd Schuelka

Seventeen Years

Corey Schmidt

Eight Years

Steve Volcko

Twenty-Seven Years

Michele Eich

Sixteen Years

Derek Dohrman

Three Years

Paige Seward

Twenty-Three Years

Lowell Davis

Denise Sargent

Jennifer Shaffer

Nine Years

Brian Good

Drew Humphrey

Two Years

Dylan Groves

One Year

Chloe Enos

Digital Workflows *continued from page 6*

Why do we need to do this?

- A more patient-centered experience
- Growth without more patient days
- Practice efficiencies

What will it give us?

- Growth in revenue per chair
- Up to 400% more patient points of contact and communication opportunities
- More flexibility to focus on additional areas of growth for your business

Look for solutions in areas of your practice that can have immediate and significant impacts from the new patient phone call, patient scheduling, new patient exam, and your treatment modalities. Look at what workflow options are available and then how a position such as a digital manager

can ensure that any processes or modalities are monitored and followed through to the patient with no interruptions in processes or systems.

The teams that use every position to passionately educate and influence patients are the truly successful practices. It's imperative you aid your team in seeing the value of these digital processes to serve your patients' ever-changing needs and expectations. When looking for a digital manager, look for a technically advanced individual that is organized, accountable, and comfortable using technology. The millennial generation thrives in this area of focus. This does not have to be on you as the doctor/owner or office manager. There are resources to incorporate the best processes for you, as efficiently and profitably as possible.

Onward and upward in your practice growth. ☺

Now Hiring *continued from page 7*

competing for people. When adding team members to your practice, consider this wise advice of what needs employees are looking for in exchange for their time and effort:

1. Flexibility (71% of people more likely to apply to this word in your ad)
2. An environment of open and on-going communication
3. A boss/supervisor who listens to their employees, and remembers the human side of work
4. Working with people who can be trusted

How is this affecting our orthodontic offices and what can we do to find a pool of good people to join our team as well as ensure that our current team members do not get burnt out and leave

- Consider some flexible work schedules, job-sharing, combining in-office with remote work, adjustable work hours

- Sit down with your current team members and discuss what their needs are, what they are passionate about, what would make them more excited about their role, areas they might want to expand in, or transition to a new position
- Appreciate the current team you now have and invite them to have a long-term career with you
- Evaluate and create an improved work culture
- Get the word out that your office is the office to be part of
- Look at people in your community that are looking for a new venture; many experienced restaurant and hospitality employees are looking for a change
- Broaden your search for new team members; reach out to job fairs
- Consider third-party recruitment
- Offer a referral bonus to your existing team members
- Offer incentives that are payable after a 90-day stay ☺

Pursuit of Excellence *continued from page 9*

Feedback Loop

All this work is information and knowledge, but that is not a habit...yet. Habits take time to form, like grooves worn on a dirt road. For many of us we need a feedback loop. Observation is a key element to this process.

Think about the greats. We have professional athletes, writers, researchers, and each one obtains and receives feedback to improve. The same should be true for yourself and your team.

Feedback is best when looking for trends. And trends can only be gathered from multiple instances. When initially learning and developing a habit, the feedback must be at a higher frequency. This allows for faster learning and adaptation.

Then once a habit is established...guess what? The feedback loop is still necessary. The span between touch points can be increased but the need never goes away. Simply knowing there will be a checkpoint in the future helps to combat the ever-constant pull toward relapse.

There are many things that can lead to relapse. A few common things are:

- New procedures or processes demanding our focus.
- Uneven workload within the day or across the year.
- Understaffing due to turnover or team member out of office.
- Our individual propensity to bend the rules, just this once.

Providing Feedback

Most people cringe and become apprehensive hearing the words, "Can I give you some feedback?" The reason for this is the association that most have equated feedback with criticism. Nothing should be farther from the truth.

To make feedback effective here are five things to consider:

- The Feedback Provider - The coach needs to be trained in providing feedback in an effective way that promotes cooperation and compliance.
- Consistency - Determine a schedule and stick to it.
- Standards - Document the intended behavior and prompts.
- Trust - Drop the secret shopper calls that feel like "gotcha" moments. Create a safe environment for celebration based on real scenarios.
- Understanding - Realize some of the greatest learning opportunities arise from outlier experiences, but be willing to accept that some scenarios are truly outliers.

How Long?

So how long do you need to check in on performance? How long until you can be done with an internal or external coach? How long until you can take observation and recordings off your overhead of time and expenses?

I'll answer as you do your patients – as long as you wish to maintain the desired results.

Because I ask you: What is the cost to you when someone calls to schedule a new patient consult and does not schedule or show up? Or what is the cost of a lack of raving fans? And what is the additional cost to attract yet another potential patient instead of winning those over that have already called or visited you?

Start the journey with a first action step. Set up recordings of your phones, your exams, and even your clinical space. You've got this! Ready, set, grow! ☺



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