

# HOW TO CREATE AND USE THE SCORECARD



## **WHAT IS A SCORECARD?**

We all remember going to school and waiting for the end of semester or school year, to get our grades written inside our Scorecards.

We use the same principle in business.

Scorecard is a document that describes what has to happen for a person to accomplish in their role, to get the best grades - or in other words to get straight "A"s.

Scorecard IS NOT a job description.

It is a set of outcomes (results) that have to be achieved by the person that is hired for a position in your business.

A job description is something like: "Looking for full time assistant, bilingual preferred, minimum 3 years of experience...".

It is what we use to let interested parties that we are looking for new team member and allows them to connect with us.

Before we hire the wanted person, we need to make sure the WE, the business owners, know exactly what we want that person to deliver - what do they have to do to be successful and us to know we hired the right person for the job - so that this person gets all "A"s.

Before we build a house, we have the architect create blueprints for our home, so we know will build the house that makes us happy. The blueprint tells the builder the size of the house, how many rooms....everything we need to have to be happy with the house.

In a similar way, the Scorecard is a blueprint that ensures the success of the person we will hire for each position in our team.

So, the Scorecard is a communication tool (everyone knows what is expected of them) is a measuring system (very easy to see if what was expected was done) and it is a management tool (what was not accomplished why and by when it will be accomplished) .

With that being said, let's dive into an example of how a Scorecard should look and how do we use it.

It is our experience that by using the Scorecard, we communicate better within the team and people love when they work in an organised business, knowing what exactly is expected of them and how to achieve it.

D Business Leadership Team

## **Example: Orthodontic Treatment Coordinator (TC) Scorecard**

### **The role (mission):**

To have the financial conversation with the patient after the doctor has done the exam and recommended treatment and make sure the patient starts the treatment.

### **The competencies:**

- understand orthodontics problems and treatment options (patient might have additional treatment questions after the doctor left the room);
- has to have sales skills (to reach conversion goals);
- be computer literate;
- know how to overcome objections;
- have a loving personality;
- be coachable;
- be flexible;

### **List that TC works from:**

- All New Patient (NP) information entered before the Exam (who referred; DDS; last cleaning; chief concerns, DDS referral note; all insurance information entered and insurance verified)
- New Patient - Welcome call - done (confirmation call for the appointment) - noted in chart
- Excellent NP exam skills – quality records taking - relationship building with patient/ parent
- Maintain conversion rate at or above 80% - skills in overcoming objections
- Fill TC tracker - we note any patient that was recommended treatment and did not start the day of the exam – we note the objection and the follow up steps
- Work the reports (treatment that was recommend and not accepted yet, or patients that needed dental work first and now might be ready)
- End of day – verify all NP exam notes are in the chart, DDS letter sent, Treatment plan entered in chart

- Prepare information for all of Owner meetings with DDS
- Provide excellent patient care and ask for 5-star reviews – receive 2 reviews per week

**Here are some additional thoughts for a dental TC Scorecard:**

- Manage all treatments for patients (has her own column)
- Maintain current treatment records and x-rays
- Schedule all recommended treatments
- Always schedule Next visit (before the patient leaves today's appointment)
- Manage unscheduled and pending treatments
- Ask for 1-5 star reviews a day
- Schedule production at \$\$\$ /per day based on the doctor goal
- Have a case acceptance /conversion rate 80% or more
- Have 85% utilization rate (on a weekly basis the chair is productive 85% of the time or more)

**The key question is:**

- What should this person, in this position do (daily, weekly, monthly), that if they did well, you (the doctor) would never want this person to leave your practice?