ExecTech
Management Consulting

MORE PROFIT
LESS STRESS



HOW TO MOVE UP TO YOUR NEXT LEVEL OF SUCCESS

ExecTech Management Consulting
360 Kiely Blvd, Suite 100
San Jose, CA 95129
(800) 555-6063

www.exectechdental.com

Copyright © 2022 ExecTech of Northern California, LLC. All rights reserved.

Contents

Introduction 1

Part I: More Profit 3

1. More Profit from More New Patients 3
2. More Profit from Increasing Your Average Income per Patient 5
3. More Profit from Raising Your Fees 6
4. More Profit from Increasing Your Collection Percentage 7
5. More Profit from Reducing Your Overhead Percentage 8

Part II: Less Stress 9

1. Less Stress from Staff 9
2. Less Stress from Patients 11
3. Less Stress from Surprises 12
4. Less Stress from Opposing Forces 13
5. Less Stress from Fear 14

Part III: Move Up to Your Next Level of Success 15

1. Level 1. Master Your Management Skills 15
2. Level 2. Use an Associate 16
3. Level 3. Sell a Partnership 16
4. Level 4. Sell Out and Move On 17

Part IV: Ten Frequently Asked Questions About ExecTech 19

1. Why Is ExecTech Better than Other Management Firms? 19
2. What Benefits Can I Expect from ExecTech? 20
3. How Much Does ExecTech Charge? 20
4. How Much Time Does an ExecTech Program Require? 21
5. What Is Included in ExecTech's Program? 21
6. What Are ExecTech Consultants' Qualifications? 25
7. What Is ExecTech Coaching? 25
8. How Will My Staff Be Involved? 26
9. Does it Matter If One of My People Dislikes ExecTech? 27
10. How Long Will it Take Me to See More Profit and Less Stress? 27

Your Potential and the Next Step 29

Client Testimonials 30

Introduction

Congratulations! You finished school, started or purchased your practice, learned many things through trial and error, and you survived Covid-19. By now, you know that to run a practice, you must wear many "hats." The two most important hats are your clinical hat and your owner hat.

You have the training and experience to wear your clinical hat. Caring for patients is a pleasure for you. But wearing the owner hat, especially without training, can be stressful and unprofitable.

Like any business owner, it's your job to bring in new customers, organize the operation and make a profit. If you wear your practice owner hat properly, everyone is also happy. Your patients like your practice, your staff members like their jobs and your family members like having plenty of money and time with you.



If you fail as a practice owner, everyone suffers. Patients do not receive the quality care they deserve, your staff members lose their jobs and you make no profit.

When a practice goes out of business, it is the owner, not the doctor, who has failed.

Why Do Practice Owners Fail?

One reason they fail is because they follow bad examples. For instance, if one of your past bosses screamed at you, you might use anger too often with your staff. Or you might do the opposite and be too nice to your staff.

Practice owners fail when they try to delegate the owner hat to an office manager. These staff members try to lead the group, set policy or manage spending, but they usually fail. They may also hurt the practice with excessive payroll, cliques, drama, and so on . . . even embezzlement!

The most common reason practice owners fail is they simply do not know what they are doing. No one has helped them promote the practice, manage collections or deal with business problems.

Unfortunately, when practice owners attempt to solve this problem by going to business school, they still fail. They learn about corporate structures, budget projections and international economics, but not how to hire great employees, create a positive web presence or improve staff performance.

This leaves practice-building seminars and consulting programs as the solution most often used by successful practice owners. The job of such firms is to help practice owners earn greater profits in a legal and ethical manner.

Your Job as a Practice Owner is to Earn a Healthy Profit

Without profit, you cannot give your patients the highest quality of care. You cannot buy the latest equipment, afford the best employees or learn the newest treatment techniques. Even worse, your low income hurts your family, increases your stress and ruins your mood.

Fortunately, despite the economy, managed care and government interference, you can ethically increase your profit every year. You can have a five-star team of employees. You can have a state-of-the-art facility and freedom from financial worries.

To take command of your practice, reduce

> *"Traditionally, we don't get much business training in dental school. We're thrown into practice and expected now to run a business without much understanding of how a business operates. ExecTech was like going back to school for helping me understand how to view my practice as a business so it is solvent, prosperous and productive."*
>
> *Bradford Baker, DDS*

your stress and increase your profit, you only need to change one thing: how you wear your practice owner hat.

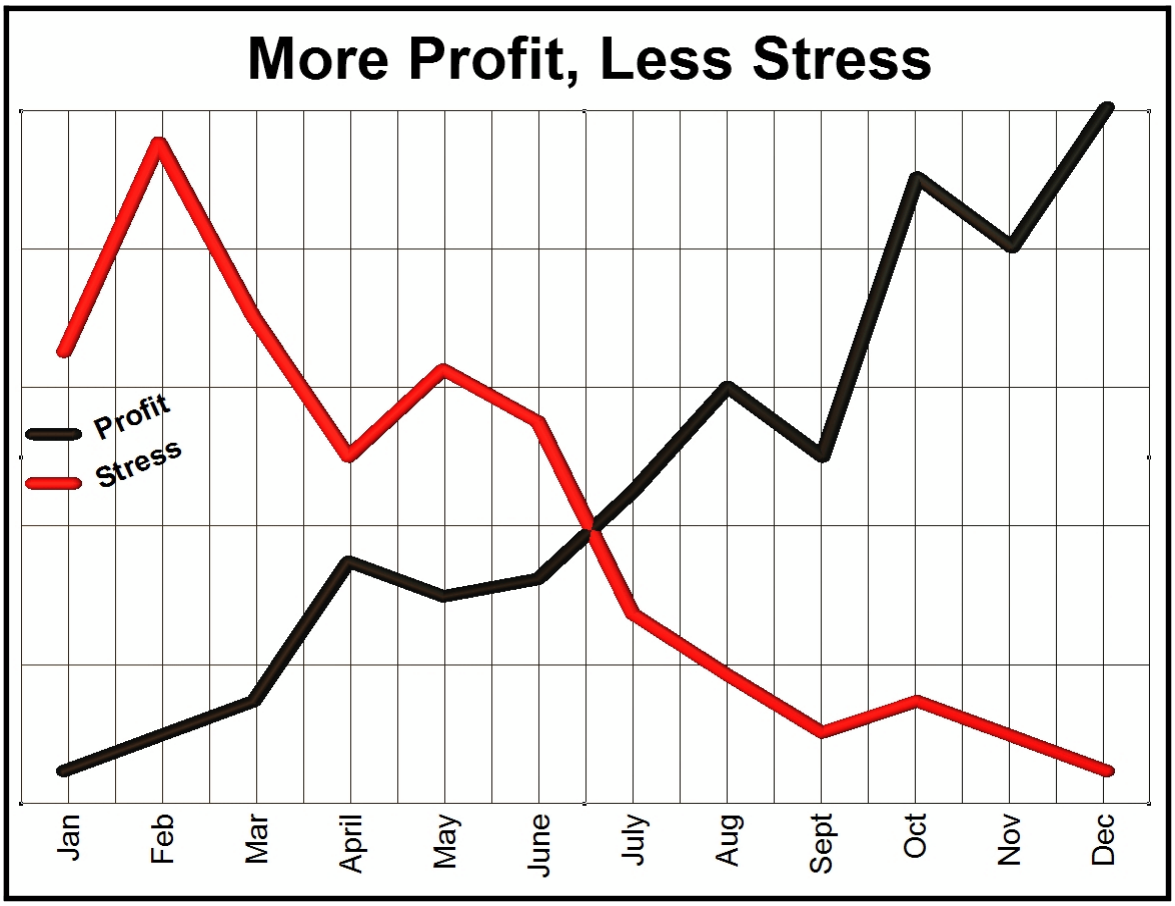
What Are the Practice Owner's Duties?

Setting the group's goals, establishing its purposes and laying out the broad plans. Establishing the office policies, procedures and systems. Writing the job descriptions, procedures and checklists for each position. Hiring, training and apprenticing the group members. Being responsible for public relations, marketing, quality control, patient management, collections, record keeping, human resources and the office space. Managing legal matters, computer systems, taxes, contracts, security, spending, investing and much more.

When you properly and skillfully wear your practice owner hat, you earn more profit with less stress. You bring out the best performance from your staff members and pay them well.

You bring in the types of patients you love to treat. You have the time and resources to give them the best care possible.

ExecTech helps you take control of your practice, one step at a time. You make orderly progress toward your goals. You take your practice where you want it to go.



Part I: More Profit

Five Ways to Earn More Profit

1. Attract more new patients
2. Increase your average income per patient
3. Raise your fees
4. Increase your collection percentage
5. Reduce your overhead percentage

1. More Profit from More New Patients

Attracting high-quality new patients is easy if you do just three things:

- Stop believing the seven myths about marketing.
- Improve your PR (public relations) image. Make you and your practice well known and well thought of.
- Find and use the marketing methods that work best for you, such as your website, motivating others to refer, advertising campaigns and so on.

The Seven Myths about Marketing

Myth 1: "If I provide good care, new patients will find me."
Truth: New patients only come if you get their attention and invite them in.

Myth 2: "Marketing is unprofessional."
Truth: Practice owners who say this are either afraid of competitors or overly concerned about what others might think of them. You cannot let these other doctors stop you from promoting your services. After all, failing as a practitioner is *very* unprofessional.

Myth 3: "Financially qualified patients don't respond to marketing."
Truth: If you look at wealthy people's possessions, you see the results of good marketing.



Myth 4: "I don't have time for more patients."
Truth: If your purpose is to help as many patients as possible, make a positive impact on society, or earn greater financial rewards for you and your group, you can never have enough patients.

The real problem may be that you do not delegate enough responsibility. When you establish an organized, responsible team of skilled staff and associates, you can accept an unlimited number of new patients.

Myth 5: "Managed care makes marketing unnecessary."
Truth: If too much of your practice is controlled by low-paying plans, you can neither afford to treat your patients with the quality of care they need nor earn the profit you deserve. Instead you need to promote and provide valuable elective services as well as attract better-paying new patients.

Myth 6: "Good marketing takes a long time to work."
Truth: If a campaign is worthwhile, it works immediately. For example, a well-designed postcard or internet advertisement, based on your prospective patients' needs and wants, produces new patient calls that same week.

Myth 7: "I'm having problems because my competitors are so successful."

> *"In just a six month period, ExecTech has helped our practice increase our new patients from 2 new patients per month to 24 per month.*
>
> *Cory Timbers, DDS*

Truth: Actually, the opposite is usually true. For example, when an orthodontist creates broad public awareness of the value of adult orthodontics, all orthodontists in the area benefit.

Every neighborhood in America is full of patients who are not getting the kind of care they need. Most can easily pay for your services, if they want to. If these potential new patients are not calling you, the problem does not stem from your competitors, but from your failure to make the public aware of your practice and the benefits you provide.

The $81,000 Website Package

A practice partnership owner paid $25,000 to a website design firm to create "the most spectacular and unique website in the county." They worked on it for months and sweated out every detail. Finally, the exciting day arrived and the website went live!



The doctors then invested $8000 per month for internet advertisements, social media, monthly e-newsletters and SEO work. "We'll write your newsletters and start your blog."

They told the doctors, "Everyone's on Facebook, Twitter and YouTube. You'll get TONS of new patients from these. We'll even write all your posts and tweets for you and post some terrific videos for you."

"With SEO, we guarantee you will be #1 in search results for many key words."

The practice owners waited for the flood of new patients for two months, but nothing happened. The website design firm said, "The search engines need to find you. It might take a few more weeks. The ads are now just starting to get clicks to visit your website, so be patient."

The doctors continued to pay $8000 per month on the campaign before realizing an important fact: You cannot generate new patients by throwing money at the problem.

Even worse, the partners' consultant did a search using a few key phrases from their new website, Facebook posts and newsletter, and found over 1100 exact matches. Nothing unique about their web presence at all!

After seven months, the practice owners and consultant cut the monthly fee to $600 and closed the fake social media accounts. They then generated more new patients using proven methods that are mostly free, and proven to work, year after year.

Public Relations and Marketing

ExecTech shows you how to attract new patients by finding the best mix of PR and marketing activities for your practice.

PR and marketing are separate activities.

PR enhances the image of your practice, creates goodwill and makes your practice well-known and liked.

For example, celebrating a holiday inside your office is PR. It does not generate new patients, but it makes your patients feel a connection to your practice. PR activities range from office decor, staff uniforms and newsletters, to patient birthday cards, community talks and website articles.

"Before ExecTech, I didn't have a marketing plan. I'd say, 'Oh, I want to do this' or 'Oh, I want to do that' or 'Maybe I'll do something.' There was no evaluation of whether or not a marketing idea worked.

"It was just a matter of sitting down with my consultant and deciding what it was that I wanted to achieve. We put together a plan and it's been working for about three-and-a-half years now."

Mark Hoffrichter, DDS



Marketing invites patients into your practice. Our clients learn that brochures, mailers or local ads are twice as effective when the public already has a favorable impression of you and your practice. For example, the results of an ExecTech client's newspaper ad went from five new patients per month to 25 per month after the paper published an interesting article about his practice.

As another example, when your web PR includes dozens of positive reviews, your website generates twice as many hits and appointments.

PR and marketing are done both inside and outside your office. In other words, you have four phases of activities to generate new patients:

1. Internal PR
2. Internal marketing
3. External PR
4. External marketing

You take control of your new patient flow by moving through each phase. Before one phase can truly be profitable, the previous phase must already be in operation. Like the gears in your car, you get the best results when you go from the first phase to the second phase and so on.

For example, you spend $25,000 on ads that attract 50 new patients. However, your practice does not have a warm, comfortable feeling (Internal PR). Nor do you have a system for generating referrals from existing patients (Internal marketing). As a result, these 50 new patients do not stick around, nor do they refer new patients to you. Your advertising dollars are wasted.

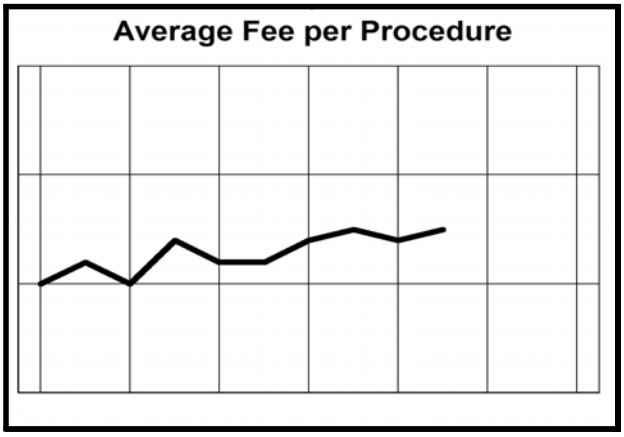
These four phases also give you a gradient approach to assist you with implementation. The first phase is the easiest to implement; the second phase is the next easiest and so on.

ExecTech consultants provide their clients with dozens of proven methods in all four categories, and we are constantly updating our lists. All the methods we recommend are proven to work in other offices, and most cost you little or nothing. As an ExecTech client, you and your consultant monitor your results using a new patient log. You expand on those methods that attract the types of new patients you want. You drop the methods that are not right for you.

2. More Profit from Increasing Your Average Income Per Patient

You can increase your per-case average in many ways, such as improving your patient communications, organizing your front desk, tightening your scheduling system and so on.

ExecTech has developed a patient-management system that maximizes your income per patient as it is customized for each client. Although the system includes 102 steps,



you will see an increase in your per-patient average by implementing the steps that are weakest in your practice.

For example, if more than two percent of your patients miss appointments, you implement ExecTech's twelve steps on patient scheduling. If new patients ever drop after their first visit, you implement the eight steps that make new patients feel welcome. Other steps in this

system include forming a trusting relationship, helping patients set goals, stress-free patient financing, using feedback forms, and scheduling for production.

Strengthening your people skills can also have a profound effect on your per-case average.

> *"The way I now approach new patient consultations has made a big difference. I was not focusing on the language necessary for patients to have confidence in me as the doctor and as an authority on the subject. ExecTech has helped me to exude more confidence and say, 'This is what's needed and this is what we need to do to get started.'"*
>
> *Bradford Baker, DDS*

Purdue University once studied why some of their graduates succeeded in the real world and why others did not. After years of monitoring their graduates' successes, Purdue reached the following conclusion:

"The average salary of the students with the highest grades was just slightly higher than the average salary of all the graduates. However, the salaries of the most popular students, the ones with the good personalities, were much higher than the average of all students. Also, their salaries were much higher than the students with the highest grades."

Anyone can become more popular by using the people skills taught by ExecTech. When you use these skills, people understand you, believe in you, support you, trust you and feel confident with you.

When you use these skills, your patients and staff follow your instructions with more accuracy, more willingness and more enthusiasm.

Your per-patient average goes up as your stress level goes down.

3. More Profit from Raising Your Fees

You improve your skills and treatment quality each year. So increasing your average fee is appropriate and necessary for your practice's success.

You can increase your fee averages, regardless of economic conditions, in five ways:

Raise Your Elective Services Fees

You can and should offer non-covered services and products. Let your patients decide what they want. For many practices, the profit from non-covered services justifies the losses incurred from covered services.

Drop Unprofitable Payment Types

Practice owners always see an improvement when they drop their worst payment types. Their empty slots fill up with higher-paying patients and their fee averages increase.

To determine which payment types are unprofitable, you need to calculate your break-even point for each procedure. For example, if you need $75,000 gross income per month and have 9000 production minutes available per month, you need to collect $8.33 per production minute.



Request Higher Fees

Some plans allow for annual increases, but you need to read the fine print.

For example, one plan states that you can submit a new fee schedule every six months; those who do so eventually have higher reimbursements than those who do not. Another

plan's contract includes an annual three-percent fee increase, but only if you ask for it.

Additionally, you can always renegotiate your contracts, especially if your practice provides unique services.

Raise Your Full-fee Patient Prices

Your cash patients are often your VIP patients.



Although you give all of your patients your best treatment, regardless of their form of payment, give service extras to your VIP patients: immediate appointments upon request, more detailed treatment explanations, nicer waiting areas, unhurried doctor and staff time and so on.

Switch to a Boutique or All-cash Practice

Certain practice owners, who are fed up with the third-party reimbursement system, are switching to a mostly-all-cash practice or adding a boutique-practice fee. Patients pay you directly and then seek their own reimbursements. This buys you and your staff more time to care for your patients. And, of course, you can raise your fees at will.

With a boutique or mostly-cash practice, you can use your knowledge and expertise to determine your patient's course of treatment without anyone else's approval. No more waiting for the mail, writing reports, answering insurance queries, appealing denials, losing money or getting upset. You take control of your destiny!

4. More Profit from Increasing Your Collection Percentage

Third-party delays, denials, reductions, code disputes, exclusions, review companies and queries can ruin the joy of treating patients. However, you can, and should, collect 100% of the money promised to you. You may need to fight to get it.

For example, of all insurance claims submitted and then denied (including fire, theft, health, life, etc.) fewer than one percent are ever challenged! The insurance companies count on this fact. They show a strong position when reducing or denying your payments, to discourage disputes. However, most of those who artfully and consistently challenge insurance companies earn more profit.

ExecTech's model letters, advice and forms are based on laws that support you and your patients. For example, health plans state or imply "in good faith" that patients will receive adequate care. When insurance companies interfere with the beneficiary's care or refuse to pay for services, they are acting "in bad faith." If you use the words "bad faith" in letters and calls, insurance companies pay attention as they know that patients usually win bad-faith lawsuits.

You must be smart and vigilant to collect 100% of the money owed to you. Your finance staff must carefully compare the agreed-upon reimbursement rate against every check paid to you.

"We were letting people walk out the door without paying and tracking them down later. ExecTech helped our collections by showing us how to get the patients to pay at the time of the appointment. From a collections standpoint, it's more efficient. The front desk staff just needed to learn to say, '"How would you like to pay today, credit card or check?"

Steven Shuff, DDS

To increase collections, you must be involved with patient collections. For instance, when your staff is not collecting 100% of the patients' portions, you must train them, coach them and motivate them until they do the job correctly.

We also recommend you get your practice out of the credit game. Mailing statements to patients costs you thousands in labor, supplies and postage each year. Your staff members spend time handling accounts instead of helping patients receive their care.

5. More Profit from Reducing Your Overhead Percentage

Of course, you must cut out wasteful spending, but cutting costs will never make you wealthy. For the most part, salvaging paper clips or spending hours negotiating a 10¢-per-hour pay dispute is a waste of time.

Your time is worth at least $400 per hour in gross revenues. Every hour you spend must eventually result in $400 of income to your practice: patient care, paperwork, staff training, phone conversations, everything must somehow pay off. With every task, ask yourself this: "If I do this job, will I bring in $400 per hour?"

Cleaning your parking lot or installing some equipment may save you $15 or even $150 per hour, but that same hour could also be spent with patients. Even better, spend that hour improving your practice in a way that adds thousands to your bottom line.

Some practice owners try to increase their profit by reducing their monthly payroll. Yet reducing labor costs can cause revolts and reduced productivity. In fact, your employees have the opposite intention; they want raises!

ExecTech's approach is to reduce your payroll *percentage*, not by cutting staff pay, but by increasing your income with staff productivity bonuses. Your team earns more pay by increasing your profit.

With productivity bonuses, top employees make more pay than comparable workers in other offices. These workers prefer the freedom to raise their own pay over the trap of a fixed salary. You are no longer the only one worrying about financial improvements!

> *"I tried some bonus programs from some other consultants that were difficult to figure out. Now, we have switched to a fairly simplistic bonus system.*
>
> *"It's all part of the ExecTech training where you learn how to track statistics and stay focused on the goals. My staff are getting bonuses based on goals."*
>
> *"They reach the goals, they get rewarded. I think that positive reinforcement has helped motivate the staff. They are all very happy when we make our collections, production and new patient goals because they get a bonus for it. They figure out how to make it happen."*
>
> *Isaac Chin, DDS*

ExecTech also shows you how to consider your overhead costs as investments. Everything you spend must come back to you with profit. If you invest a dollar in a new piece of equipment or a new employee or an advertisement, you must receive more than your original dollar back in profit.

Reducing your overhead percentage by 1) ensuring that your time is worth at least $550 per hour, 2) linking staff bonuses to your practice's success, and 3) wisely investing in your practice, guarantees your profit will increase.

Everyone wins!



Part II: Less Stress

Five Sources of Stress

1. Less Stress from Staff
2. Less Stress from Patients
3. Less Stress from Surprises
4. Less Stress from Opposing Forces
5. Less Stress from Fear

1. Less Stress from Staff

Even if you are a brilliant clinician with thousands of loyal patients, you can only take your practice so far before you need others to help you.

Skilled staff management is *not a talent* anyone is born with, *but a skill* anyone can learn.

As the owner, your practice is your kingdom. The people you employ must do what you ask—not whine, give excuses or oppose you. To create a productive team, you must know how to organize and motivate your team members, and decide where to lead them.

To help you take command of your practice, ask each of your employees to list all of their duties. The lists reveal a great deal about your practice and employees.

For example, one office manager listed more than 50 vital duties for which she was taking responsibility; many had never been assigned to her. She just took the initiative. She deserved a bonus plan.

On the other hand, another office manager's list of duties was wordy and vague. So the ExecTech consultant dug deeper to find what she actually did to justify her $7,500 monthly salary. He found lots of "supervising" of the two other staff members, but little work of her own.



The practice owner was convinced that he could not survive without this high-priced office manager, but his consultant had seen this type of arrangement before. So they sent her on a one-week, paid vacation to see what would happen. While she was gone, production increased, stress decreased and everyone was happier.

When she returned, the practice owner assigned her several real responsibilities and she soon quit.

No staff member is indispensable, but all are priceless if you hire and manage them correctly.

You find relief when employees learn to complete their assignments, increase productivity and support your goals. Proper staff management can be a joy to both the employer and the employees.

> *"I use to have many staff issues that caused me a great deal of stress. I was unable to motivate my staff and they did not perform tasks the way I wanted them to.*
>
> *"ExecTech taught me a more effective way of management by utilizing systems, policies, expectations, training, and encouragement. I am a much better leader now and finally have a real team in place.*
>
> *Ray Shirani, DDS*

25 Common Stress Points from Staff

Which of the following stress points exist in your practice?

❒ 1. Do you regularly get angry or exasperated with staff members?

❒ 2. Do you hate giving performance reviews?

❒ 3. When employees bicker or fight, do you look the other way?

❒ 4. Are tasks you assign to staff members delayed or ignored?

❒ 5. Do you wonder if you get your money's worth from your employees?

❒ 6. Are you uncomfortable about your staff approaching you with questions or problems?

❒ 7. Do any of your staff members waste time during working hours?

❒ 8. Do you track a weekly production statistic for each of your staff members?

❒ 9. Is it easier for you to tolerate poor staff attitudes than confront and handle them?

❒ 10. Is it difficult for you to fire employees?

❒ 11. Are your staff meetings unpleasant at times?

❒ 12. Do you ever feel you pay your staff too much in pay or benefits?

❒ 13. Do your staff members know exactly what you want from them?

❒ 14. Is there confusion about who is responsible for which jobs?

❒ 15. Is it easier for you to just do certain tasks than to delegate them?

❒ 16. Do you dislike any of your employees?

❒ 17. Is it hard for you to make decisions regarding staff discipline?

❒ 18. Do your employees constantly find new ways to irritate you?

❒ 19. Do staff members bring their personal problems into the office?

❒ 20. Do you find yourself solving problems that your staff should solve?

❒ 21. Do any of your employees ever seem to fight against you?

❒ 22. Do you worry about being sued by an employee some day?

❒ 23. Are you the only one who cares about the practice?

❒ 24. Do your employees require too many decisions from you?

❒ 25. Do you fail to get tough when you should?

Each of these sources of stress can be resolved.

For example, nothing drives a practice owner up the wall faster than noncompliance. "Jill, please clean up the reception area before going home tonight." She says, "Okay doctor."

The next morning, "Jill, what's the problem? Why didn't you clean up the front area last night?" She says, "I'm sorry, I'll do it tonight."

The next morning you say, "Jill?" She says, "I was too busy. Don't worry about it."

The following morning, you just walk through the messy waiting room and try to control your anger.

Fortunately, you can obtain compliance without stress. Imagine asking for anything and getting it done without difficulty.

"Doctor, the waiting area is clean."

"You'll be glad to know everyone has been on time every morning for two months now."

"I wrote up how to use our new alarm system, like you asked. Here's a copy for you."

"All the patient files have been scanned and are ready for the shredder."



One tool you can use to obtain compliance is with ExecTech's Interoffice Communication Form.

To get compliance, you should:

1. Put the assignment or instruction in writing
2. Make it understandable
3. Include a deadline
4. Keep a copy until the assignment is completed.

Here is a sample of the form we recommend you use:

Interoffice Communication Form

To _____ Position _____ Date _____

From _____ Position _____

'' Emergency Order '' Assignment '' Request '' Suggestion '' FYI

Message:

Please complete by _____ Signed _____

Completion Details or Response:

Signed _____ Date _____

You may request a free digital copy of this form by emailing info@exectechdental.com.

Written assignments are superior to verbal assignments as they do not change. They are not forgotten by you or the employee. The assignment sits there until the job is done.

Including a deadline helps the staff member understand the importance of the order. If the deadline says "Today, by 5:30 p.m." everyone knows it is more important than "By the end of the month."

When you issue staff instructions to your staff members correctly, the willing employees are happy to comply with your wishes. They know what you want, when you want it and that you won't forget about it.

However, with some employees, you need to hold a firm position and assert yourself. How and when you get tough is another important staff-management skill. Done correctly, no one stays upset and you get what you want.

2. Less Stress from Patients

Immediately after recovering from a massive heart attack, one practice owner went to his office and made two piles of charts. One pile included all of the patients he loved to treat; the other pile included the patients who caused him stress.



While in the hospital, he had resolved to dismiss all his troublesome patients before they killed him with stress. Identifying these patients was his first step.

Do you need to make two piles of charts?

Consider dismissing the following ten types of patients:

- Patients who abuse your attempts to help them or refuse to follow your recommendations.
- Patients who upset your employees or other patients.
- Freeloaders who refuse to pay.
- Patients who are chronically late or who frequently miss appointments.
- Anyone who disrupts your practice.
- Patients who you honestly feel you cannot help.
- Patients who you or your staff can never please, despite your best efforts.
- Patients who might be a threat to anyone in your office.
- Patients you feel relieved at the thought of dismissing.
- Patients your staff recommends you dismiss.

Of course, before you dismiss anyone, ensure they will not sue you for malpractice, discrimination or abandonment. Using ExecTech's patient dismissal system (free guideline upon request), you can safely dismiss these types of patients without fear. As a result, you create room in your practice for the patients you love to treat. You create a happier environment for you and your staff.

Advanced People Skills

A more profitable method for dealing with difficult patients is to turn them into cooperative patients. However, this requires people skills most people do not possess.

For example, some patients are difficult because of the stress in their own lives. With a few key words, expressed with the correct emotional tone, you can move them away from their stress and focus their attention on the present. They become cooperative, pleasant patients who appreciate your ability to deal with them.

"We all have patients that are fearful, antagonistic and this and that, and it used to affect me before I knew the things that ExecTech taught me. It used to bring me down for days. Now I am able to handle them.

"Once you can handle these patients, you can then manage them in other aspects, like how they take care of their appointments, how they pay their bills, how they listen to your treatment recommendations, how they follow through. It brings everything together."

Bita Saleh, DDS

3. Less Stress from Surprises

If you hate being surprised, you will not like management.

For example, one day you are working in your practice, believing everything is fine. Then WHAM! A trusted employee calls you names and quits. The state board sends you a complaint. A former associate steals a patient.

A crazy patient sues you for sexual abuse. You discover your office manager has embezzled $10,000. Your computer system crashes.

You will get hit with many surprises throughout your career. Statistics crash, income is lost and practices close because of catastrophes.



In fact, the bigger your practice gets, the more frequently you will be surprised. At $50,000 per month you may get one good surprise every third month. At $100,000 per month, you might get hit with one disaster every month. At $250,000 per month, the stress from surprises might kill you . . . , if you are unprepared.

Most practice owners take surprises too seriously. Catastrophes become more important to them than taking care of their patients or their practices. They often decide the best solution to surprises is to reduce the size of their practices.

How do you handle surprises?

Burying your head in the treatment room makes you afraid of your practice. Reacting by getting upset or angry when you are surprised only makes a bad situation worse. Turning into

a piece of wood so that surprises do not shock you, makes you ineffective. And constantly worrying about surprises makes your life unenjoyable.

Surprise Insurance

Your best insurance against surprises is to predict and plan for catastrophes, in advance.

Once you have a plan to prepare for and handle every conceivable surprise, you can relax. If the disaster occurs, you are ready for it. Instead of reacting to the problem while under stress and prone to making mistakes, you take command of the situation and resolve it using your plan. Your prosperity continues.

"Before starting with ExecTech, I didn't know how to run a business. Because of ExecTech, I now know how to run a business. I know what I'm doing. The learning process is broken down into understandable steps and each step is doable.

"They taught me how to train and handle staff. My office is happy and everyone communicates well. There are no hidden agendas; everything is up front. It's a win-win situation.

Steven Cohen, DDS

For example, you learn that a former employee is suing you for wrongful dismissal. Because you planned for this possibility in advance, you know exactly what to do. Your paperwork is filed and organized. You send a copy to your attorney. Your lawyer sends a copy of the file to the employee's attorney. The employee's attorney sees you have done everything correctly and drops the case.

New problems and surprises are part of the challenge of managing a practice. Predicting and planning for surprises reduces their frequency and lessens the damage they will cause you.

Surprise planning with ExecTech significantly reduces your stress. You stop worrying about potential disasters and start focusing on improvement and growth.

4. Less Stress from Opposing Forces

When you have no opposition, you sail to your objectives without strain! You take two steps forward and no steps backward.

However, all practice owners have so much opposition, they get used to it. They believe they must learn to live with it.

For example, insurance companies constantly reduce or deny your payments. Colleagues treat you like an enemy. Patients complain. Family members give you grief.

Everyone around you can appear to oppose you more often than they support you. This is why your statistics go up and down; you push your stats up while other forces push your stats down.

In other words, you take two steps forward and one or two steps backward.

Even worse, the more successful you are, the more opposition you face. When people "fear success," it is not really success they fear. They're afraid of the hostility or resentment that comes with success.

The solution is not to reduce your goals or to be invisible, but to increase your ability to eliminate opposing forces.



Your Greatest Source of Stress

The most destructive opponents you face are somewhat hidden: the critical patient, the backstabbing employee, the revengeful colleague, the malicious family member or even the nasty neighbor.

These types of people do not come right out and attack you; they prefer to wear you down

"One thing that I really like about the program is the way that that my consultant has helped me with hiring strategies. I am now hiring the right people for my practice, which makes management much easier than it was in the past."

Safa Khaleel, DDS

with covert comments and suspicious acts. They keep you up at night, make you act irrationally and burden your mind.

The only way to reduce their influence is to either handle them directly, or cut them out of your life. This topic is so important, ExecTech consulting and coaching will help you identify and overcome this type of opposition.

Reducing or eliminating the counter forces in your life is not only a great relief, it also means you can now focus on your goals.

5. Less Stress from Fear

Fear ruins your ability to run your practice and closes the door to your many opportunities. Fear causes anxiety, avoidance, procrastination, shyness, indecision and self-doubt. You cannot be an effective leader nor make good decisions when you are under the influence of fear.

For example, practice owners who have signed too many managed care contracts admit they signed out of fear. "I decided my patients would leave me if I wasn't on their plan." "I was worried that everyone in the community was under this new plan." "I was afraid to promote my practice."

A local practice owner was afraid of offending people. One day, his wife sent him into a room to dismiss an assistant who was irresponsible, chronically late and a bad liar. When he came out of the room, his wife asked, "Did you fire her?" He said, "Well, I told her we were not happy with her, and she started to cry. So I gave her a raise."

Another practice owner was afraid to talk about money with patients and staff members. He allowed dozens of patients to use the pay-when-you-can plan, which ruined his collection percentage.

To solve the problem, he hired an aggressive receptionist. She fixed the collections problem, but then threatened to leave if he did not pay her $7,500 per month. Because he could not talk about money with anyone, including her, he met her demands and suffered.

To help you overcome anxiety or fear, ExecTech takes a business approach: 1) precise planning, 2) private coaching and 3) gradually facing the fear. You decrease your fears by widening the size of your comfort zone. Anyone can negate a fear this way.

For example, an expert dermatologist was terrified of public speaking. He routinely turned down offers to give talks at society meetings and state conventions. He even refused to be interviewed on a local talk show.



To resolve this fear, he and his consultant worked out a five-minute speech and rehearsed it a few times. The consultant then had him give the talk to two people until he was comfortable giving the speech to them. Then three people and so on until everyone in the office heard his speech.

The doctor realized he could do anything if he practiced it first. He accepted and later pursued speaking engagements. As long as he rehearsed his speech beforehand, his presentations were outstanding.

Many practice owners are so afraid of having a loss, making a change or being embarrassed that they do not see their opportunities.

You cannot steal second base with your foot planted on first. You can never get ahead if you refuse to jump up and go!

Successful practice owners learn to push through their fears and mental barriers. They recognize opportunities, make decisions and act.

Part III: Move Up to Your Next Level of Success

What is your next level of success?

If everything went perfectly well for you during the next year, how would your practice improve? What would your practice be like?

This is your next level of success.

Perhaps you want a 30% increase of new patients, production and income. Maybe you want your working hours to drop in half while your statistics continue to increase. Or maybe your next level includes a second practice.

With most ExecTech clients, taking their practice to the next level includes mastering their management skills and implementing systems so they can maximize their current facilities. In other words, to generate as much profit as possible, as a sole practitioner. For many, this is the practice of their dreams.

For others, it is just the beginning.

Four Levels to Maximum Success

You help the greatest number of patients, and earn the greatest amount of profit, as you move your practice through these four levels:

Level 1. Master your management skills.

Level 2. Use an associate to double your productivity.

Level 3. Sell a partnership to your associate or other worthy candidate.

Level 4. Sell out and move on.

Level 1: Master Your Management Skills

You may fail to reach your goals because you never learn how to manage your practice. You never take advantage of the opportunities in front of you.

For example, if you cannot confront defiant employees, your production suffers. Yet with a little education in staff management, your staff become cooperative and twice as productive. The door opens to you becoming a millionaire!

If you hire an associate before mastering your practice, your management weaknesses are also magnified.



For example, if you cannot correct a staff member's poor performance, you will not be able to correct your associate's poor performance. If you cannot generate an abundance of new patients for yourself, your new associate will not have enough work to do. You lose money.

To take full advantage of the opportunities in your practice, and before hiring an associate, you need to master these 20 management skills.

- ❒ 1. How to create a broadly-known, positive PR image in your community.
- ❒ 2. How to market the practice internally and externally for a steady flow of new patients.
- ❒ 3. How to handle patients who are angry, critical or afraid.
- ❒ 4. How to prevent malpractice lawsuits and government investigations.
- ❒ 5. How to obtain compliance for all your recommendations with most of your patients.
- ❒ 6. How to handle insurance claim reductions and denials resulting in full payment.
- ❒ 7. How to manage managed-care contracts for the least amount of hassle and greatest amount of income.
- ❒ 8. How to dismiss difficult and destructive patients without creating enemies or causing legal problems.

❒ 9. How to write an office policy manual that covers all legal bases and prevents common staff problems.

❒ 10. How to find and hire outstanding employees who are willing, upbeat and productive.

❒ 11. How to set weekly statistical quotas and motivate your staff members to reach them.

❒ 12. How to issue staff directives and get them completed on time, every time.

❒ 13. How to handle unwilling, defiant, lazy or dishonest employees so they either shape up or ship out.

❒ 14. How to terminate a staff member's employment without stress or upset.

❒ 15. How to operate your office computer hardware and software.

❒ 16. How to isolate and repair the causes of flat or dropping practice statistics.

❒ 17. How to analyze overhead expenses and income sources for maximum profit.

❒ 18. How to steadily increase the resale value of your practice.

❒ 19. How to manage your time for the greatest possible amount of production, income and leisure.

❒ 20. How to balance your personal and professional life.

"Before I hired ExecTech I was stuck in all areas of my practice. I could not expand, and felt like I was going sideways.

"I saw immediate results on the program. My office is now much bigger, way more manageable, less troublesome and it finally has the structure I was always hoping for.

"They helped me add 5 associates and transformed my practice to a real multi-specialty practice. Now I am able to work less days (from 5 days to 3 days a week) while making more money."

Joyce Tse, DDS

Level 2: Use an Associate

When you train an associate and get him or her producing, you earn benefits like these:

- You can train your associate to provide your quality of care
- You have more time to manage your practice and pursue new challenges
- Fewer emergency calls
- Longer vacations
- An alternate doctor for patients who you do not enjoy treating
- You can accept many more new patients
- You earn a profit from the associate's work
- Your office can be open for up to 78 hours per week (Mon-Sat, 7-8)
- The value of your practice increases
- You are grooming a potential practice buyer



Level 3: Sell a Partnership

Moving from Level 2 to Level 3 by forming a partnership expands your benefits to include the following.

- The best associate doctors stay with you. Most associates did not go to school to work as employees. They want control of their own destinies. They deserve the opportunity to be practice owners.
- You reduce your legal and financial risks when you share them with a partner.
- You can delegate important management responsibilities to a partner. Many partnerships discover a natural division of

duties based on strengths. For example, you might be the “rainmaker” who brings in new business, while your partner handles staff management duties. You might love researching new techniques, while your partner loves managing the computers.

- A partner adds a little pressure on you to do your job well. When you only have to answer to yourself, you might relax and not accomplish very much. With a partner, you have a larger obligation to do your share.
- You have someone to talk to about practice problems and difficult cases. Communication with a partner helps you to clarify confusions, explore options and work out solutions.
- Your personal working hours can decrease. If you are currently working 40-45 hours per week, you can sell a partnership, work 30-35 hours per week and not reduce your profits. Your partner can work a completely different schedule for 30-35 hours per week. This is also good use of a small office space.
- Selling a partnership provides you with additional profit equivalent to half your practice's value. You make more money selling part of your practice at its peak than when you are getting close to retirement.

Level 4: Sell Out and Move On

The wealthiest practice owners make a profit from associates’ work, by selling partnerships or by selling practices.

Your investment of energy, money and intelligence can pay off better than anything in the stock market. Or this great opportunity you have can be wasted with bad management, poor planning and inaction.

When you near the end of your career, you can go out the top or out the bottom.

Dr. Bob Goes out the Top

Dr. Bob learns all he can about practice management, works hard and spends 10 years building his practice. He hits $120,000 collections per month with less than 55% overhead. He goes through two associates before finding his match with Dr. Jill. He pays her 30% of her collections while training her to take over.



Over the next five years, Dr. Bob cuts his work week to 30 hours. Dr. Jill builds her production from $60,000 to $125,000 per month. Even though he sees fewer patients, Dr. Bob's profit increases.

Dr. Jill then pays Dr. Bob $490,000 for half of the practice. As his partner, she begins to accumulate her own wealth. Dr. Bob spends less time at the office to pursue his passion for breeding race horses.

After the partnership period ends, the two doctors finalize their buy-sell contract. Dr. Jill pays Dr. Bob the final payment of $510,000 and takes over as the sole owner. Dr. Bob moves to Kentucky to raise horses.

Dr. Ed Goes out the Bottom

Dr. Ed graduates with Dr. Bob, but with better grades, and opens a practice down the road. Although he feels he is a better technician than Dr. Bob, he ignores the business end of his practice.

After 10 years, Dr. Ed hits his career high of $45,000 per month. He is overworked because he won't delegate to his willing staff. He hires an associate, but soon fires him, ". . . for being an idiot."

Dr. Ed's production dwindles to $25,000 per month. At 65, he tries to sell his practice, but his equipment and patient base are so old that he can't find a buyer. So he sells his files to Dr. Jill for $10,000. He moves to a trailer park in New Mexico where he can afford to live on Social Security.



What Is Your Endgame Strategy?

How will you end your career? What is your plan for leaving your practice?

You have six basic options.

❒ 1. Sell your practice at its peak value and move on to something new.

❒ 2. Help your associate buy your practice when you are ready and then phase out.

❒ 3. Have your partner(s) buy you out according to your contract.

❒ 4. Sell or give your practice to a family member.

❒ 5. Stay until you can no longer work, get whatever you can for the practice or its assets, and then retire.

❒ 6. Practice until you die; let your heirs dissolve it.

How to Win Your Endgame

1. Decide which of the six options is best for you. Weigh the pros and cons for each. Consider the potential benefits, potential risks and your available resources (i.e., knowledge, skills, money, people, time). Ask yourself, "Which choice motivates me the most?"
2. After you decide on your best option, work out a plan of how you will follow this route and reach the final condition you desire most. Break down the plan into major milestones and set deadlines for each.
3. Review your plan and your progress on a weekly basis. Force yourself to take at least one action step each week that takes you closer to your goal.

Consider ExecTech to help you work out and implement your plan.



Part IV: Ten Frequently Asked Questions About ExecTech

1. Why is ExecTech better than other management consulting firms?
2. What benefits can I expect from ExecTech?
3. How much does ExecTech charge?
4. How much time does an ExecTech program require?
5. What is included in ExecTech's program?
6. What are ExecTech consultants' qualifications?
7. What is ExecTech coaching?
8. How will my staff be involved?
9. Does it matter if one of my people dislikes ExecTech?
10. How long will it take me to see more profit and less stress?

1. Why Is ExecTech Better than Other Management Consulting Firms?

Because everything we do is customized to you, your needs and your success.

ExecTech was formed in February 1991 by three consultants with one purpose: to help practice owners reach their goals. We found the most effective way to do this is by providing you with management consulting and performance coaching.

> *"I like ExecTech's two-fold approach with consulting and coaching. Consulting deals with the business end and coaching trains you on specific leadership and communication skills. It makes a big difference.*
>
> *"ExecTech is a management program unlike anything you've ever done."*
>
> *Juan Villarreal, DDS*

As an ExecTech client, you work with a consultant and a coach.

Your consultant meets with you to dive into your most difficult practice problems. He or she helps you organize your efforts so you make



steady progress toward your goals. Your consultant's job is to help you achieve specific objectives you need and want to accomplish.

Your coach calls you each week to train you on people, productivity, communication and staff management skills. You see the results of these new skills immediately as you put them to work after each coaching call.

You also have the support of the entire ExecTech organization ready to provide you with research, new guidelines and anything else you need to reach your objectives.

If you were to start a consulting company, you would probably create something like ExecTech. It is the most obvious, logical approach available. Programs based on seminars or courses do not come close to the results of one-on-one consulting and coaching.

Any size or type of practice can be improved. Any goal can be achieved. Because ExecTech focuses on the business end of your practice, it is effective with any type of practice.

You can trust ExecTech for three reasons:

1. We have no hidden agenda. Your success is our purpose; nothing more, nothing less.
2. We have a 30-year history of satisfied clients, many of whom are happy to speak to you about their experiences with ExecTech.
3. ExecTech's success depends on your satisfaction and results. When consultants do not get results, the word gets around and they do not last long.

2. What Benefits Can I Expect from ExecTech?

Since ExecTech began in 1991, we have received much praise from our clients. It is our biggest paycheck!

Below are 25 statements from our clients regarding their benefits from ExecTech. Which of these benefits would help you?

❒ 1. "I like having a consultant who is always willing to listen to me."

❒ 2. "I have learned how to deal with anything my patients or employees might say."

❒ 3. "I'm having a lot more fun."

❒ 4. "After removing the biggest problem I had in my practice, it's much easier to make improvements."

❒ 5. "Despite the economy, I'm making more money than I've ever made in my life."

❒ 6. "Staff members no longer argue with me."

❒ 7. "It's great to have both a consultant and a coach who I can trust."

❒ 8. "I've learned how to get a lot more cooperation from my staff and patients."



❒ 9. "My marriage improved because we now have more time and money."

❒ 10. "I look forward to working each morning, even Mondays."

❒ 11. "I'm now providing the type of care I want to provide."

❒ 12. "You can vent your frustrations with someone who will not become emotionally affected."

❒ 13. "I'm more popular with my patients."

❒ 14. "I'm more focused and motivated."

❒ 15. "I no longer worry about staff quitting on me."

❒ 16. "I am more decisive and confident than ever before."

❒ 17. "I'm not worried about lawsuits."

❒ 18. "This is the best staff I've ever had. I love my staff!"

❒ 19. "I got rid of the self doubts that were making it hard to run my practice."

❒ 20. "Increased collections percentage."

❒ 21. "Practice gives a dynamite first impression to new patients."

❒ 22. "My practice enjoyment has doubled."

❒ 23. "Helped me sell my practice to my associate."

❒ 24. "Really feel like my staff members want me to succeed."

❒ 25. "My consultant keeps me from making big mistakes."

3. How Much Does ExecTech Charge?

An advantage of ExecTech's one-on-one consulting program is that we can customize your fee to your needs and wants. We can also ensure your return on investment is higher than any other consulting company.

ExecTech fees are often higher than other consulting companies because we provide you with many hours of individualized work from trained, hard-working professionals. We help you implement systems that are right for you and your practice. This is why we get results where others fail.

ExecTech saves you the extra costs usually required by other programs, such as airfares, hotels, meals or airfare. Even worse, other programs hurt your productivity by scheduling meetings or seminars during your patient hours.

An advantage of a one-on-one program is that the meetings can be scheduled around your production, which means no downtime.

We give our best recommendations for lenders, practice appraisers, attorneys, accountants, web designers, management software and so on. Yet unlike other consulting firms, ExecTech does not accept commissions for recommending anyone or anything. We give suggestions and advice that give you, not us, the most benefit possible.

We want to be part of your support team for many years. To do this, you need to see a significant return on your investment, as soon as possible. Fortunately, this is not difficult because the investment is in YOU.

The best investment you will ever make is in your ability to earn more money while maintaining and improving your practice and the quality of your patients' care.

4. How Much Time Does an ExecTech Program Require?

The more time you invest in your practice management, the greater the rewards.

Ideally, you will devote 2-3 hours per week for consulting meetings, coaching sessions and study assignments.



Through trial and error, loss and failure, tears and pain, you can eventually figure out the best way to do anything on your own. However, this can take years.

ExecTech saves you the time and stress involved in researching and experimenting to find a management system that works for you. It helps you reap the gains within weeks and months, not in years.

All successful people get help. Top athletes all succeed with coaches. Corporate CEOs listen to their experts. Presidents and prime ministers rely on their advisors.

Just as your CPA should guide you with your tax and retirement planning, ExecTech helps you improve your management skills and practice strategies so you reach your goals, as quickly as possible.

> *"Our ExecTech consultant spots weaknesses that we have in the office. With the weaknesses known, of course, there are solutions to improve them. Helping me implement the systems has really helped."*
> *William Ho, DDS*

5. What Is Included in ExecTech's Program?

The package of services included in your ExecTech program is tailored specifically for you. Most one-year programs include 18-24 consulting meetings, 50 coaching sessions, customized material, and unlimited e-mail and telephone support.

The most powerful part of ExecTech consulting is how we help you reach your objectives with systems.

ExecTech's Systems

No other practice-improvement company has more step-by-step systems to help you take command of your practice, your profit and your future. For every problem, challenge and situation you face, ExecTech has a system to help you conquer it.

For example, you and your spouse cannot agree on a major decision about your office building. You want to buy it and your spouse wants to lease it. You have been arguing about it for months.

"I am very happy with the results of my ExecTech program. In my first six months on the program, my practice hit highest-ever numbers in both production and collections.

"Unlike other consultants, there is nothing about the ExecTech approach that I have found to be cookie-cutter in any way"

"From the beginning, ExecTech's goal has been to teach me how to run my practice without my consultant. They are teaching me how to do it."

Dino Javaheri, DDS

Your consultant meets with you and your spouse and goes through our decision-making system with you. Within an hour, you and your spouse agree on the decision that is right for everyone. You become a united team again.

Over the past 30+ years, ExecTech has compiled and refined dozens of step-by-step systems. Which of these systems would make your practice more successful?

Staff Management Systems

- ❒ How to hire employees
- ❒ How to train employees
- ❒ How to conduct staff performance reviews
- ❒ How to create staff bonus plans
- ❒ How to resolve disagreements
- ❒ How to resolve conflicts between staff members
- ❒ How to correct bad behavior, poor performance or negativity
- ❒ How to compile your Staff Policy Manual
- ❒ How to terminate employment
- ❒ How to hire and manage associates

Marketing Systems

- ❒ How to be the most popular practice in town
- ❒ How to select a domain name
- ❒ How to create a website that generates new patients
- ❒ How to increase your website traffic
- ❒ How to improve and expand your online PR
- ❒ How to take advantage of Yelp, Google and other social media systems
- ❒ How to use your patient list to generate new patients
- ❒ How to turn the energy of the holidays to your advantage
- ❒ How to triple your patient referrals
- ❒ How to expand your professional referral network
- ❒ How to make casual contacts into new patients
- ❒ How to handle calls from potential new patients
- ❒ How to get an article published in your local newspaper
- ❒ How to give a great talk



Patient Management Systems

- ❒ How to answer telephone calls
- ❒ How to create a powerful first impression
- ❒ How to schedule patients for maximum productivity
- ❒ How to handle difficult patients
- ❒ How to get your patients to follow your recommendations
- ❒ How to reorganize your practice for more efficiency and maximal productivity
- ❒ How to handle your overbooked schedule
- ❒ How to recall and reactivate patients
- ❒ How to reduce missed appointments
- ❒ How to handle patient complaints
- ❒ How to dismiss patients
- ❒ How to avoid malpractice claims
- ❒ How to resolve patient upsets

Collections and Financial Management Systems

- ❒ How to collect from insurance companies
- ❒ How to make financial arrangements with patients
- ❒ How to switch to an all-cash or boutique practice
- ❒ How to budget your practice, manage your spending and pay off your bills
- ❒ How to lease office space
- ❒ How to reduce your taxes
- ❒ How to invest your saving

Career Management Systems

- ❒ How to improve your personal image
- ❒ How to set goals
- ❒ How to handle setbacks and losses
- ❒ How to motivate yourself
- ❒ How to simplify your life
- ❒ How to start each week with a bang
- ❒ How to generate personal power
- ❒ How to increase your efficiency
- ❒ How to manage your time
- ❒ How to reduce your stress
- ❒ How to handle people who oppose you
- ❒ How to balance your personal life and professional life
- ❒ How to increase the value of your practice
- ❒ How to establish and manage partnerships
- ❒ How to sell your practice
- ❒ How to prepare your affairs for your death

"My practice grew to the point where I needed a bigger space to accommodate it! Thanks to their help, I now own my own building and we move my practice here.

"The skills I have learned from ExecTech will stay with me throughout my career, and the communication skills I have learned will stay with me throughout my lifetime."

Natalie Provenzano, DDS

How ExecTech Helps You Solve Problems

ExecTech consultants find permanent solutions to problems by using these five steps:

1. Agree on an objective.

What do we want to accomplish? How will we know if we are making progress toward this objective? What are the benefits for you?

The best objectives include a number. For example, "Increase the volume of new patients to 35 per month," "Raise monthly collections to $85,000" or "Reduce my spouse's hours to 20 per week and mine to 35 hours per week while increasing production."



2. Gather data.

If you can only see half of the cards in your hand, you make poor decisions during a card game. If you can see all of your cards, your decisions are better. If you can see all of the cards in everyone's hands, you can make perfect decisions. The same idea applies in business: you form the best decisions and plans when you have all the relevant information to hand.

ExecTech consultants gather information by listening to you and your staff members *and* by observing. For example, a consultant watches how you talk to your patients and employees; how your receptionist schedules new patients; how efficiently everyone works together and so on. Through observation, the consultant is able to show you more of the cards in the game.

3. Plan.

A good plan makes sense. A good plan is not complicated. A good plan motivates you.

The steps of a plan should be broken down into small action steps. It should include deadlines and sub-deadlines. It should be organized and in writing.

Even if the plan is perfect, it is worthless if not implemented.

"I have felt very comfortable recommending ExecTech. I got a lot of help out of it, especially considering the other consultants I was getting ideas from.

"Other consultants said, 'Here's your problems and here's the stuff to fix it. Goodbye.'

"ExecTech is totally different. They help you actually implement the changes. They roll up their sleeves and help you solve the problems together. It is all tailored made to you.

Steven Shuff, DDS

4. Implement.

Unlike other seminar, marketing or consulting programs, ExecTech does not give you a plan and wish you luck. We help you complete the plan.

The end result of each consulting meeting and coaching session is a step-by-step plan or "mini-program." Mini-programs include 3-10 easy tasks that you agree to do.

Mini-programs are effective because they take a major objective and break it down into manageable, bite-size chunks. As you complete each mini-program step, you take control of a small element of your practice. Several small improvements become significant gains. These gains accumulate until you reach your goals.

To help you with implementation, ExecTech offers unlimited e-mail, text, fax and telephone support. ExecTech does not overload its consultants or coaches with too many clients, so they are easy to reach.

As long as you complete each task, you see results and make orderly progress toward your goals. If you are unable to complete a task, we find out why and then help you get it done, despite any difficulties.

5. Monitor the results.

The best measure of effective consulting is, of course, statistics. You or one of your staff members report your numbers to your consultant. He or she puts them onto line graphs.

Each consulting meeting begins by reviewing graphs, especially those that represent the key objectives. The consulting meeting then deals with systems and solutions to improve those statistics.

Using statistics in consulting has several benefits.

- We can see if you are improving on a weekly, monthly and yearly basis.
- We can see the results of changes and improvements.
- You can reward or penalize people based on statistics, instead of by feelings or rumors.
- When a stat rises or falls, we can find out why. Based on what we find, we can then take the appropriate actions to ensure conditions improve.



6. What Are ExecTech Consultants' Qualifications?

We find and train outstanding consultants in the same way that you should find and train your associates.

First, we find experienced managers who are successful in their fields.

Next, each of our consultants goes through a training program based on the consulting methods we have found to be the most effective. Management consulting itself is a technical skill with its own procedures and techniques. Done correctly, you get the same good results, every time.

Finally, we closely monitor the results of all our clients to ensure you are not only satisfied with your service, but are making steady progress toward your objectives.

And, just as you should offer partnerships to your top associates, we do the same with our top consultants.

ExecTech's consultants provide better results than former practice owners or former office managers. For example, untrained consultants usually focus on ideas that worked for them and rarely find what works best for you. Just because you are a good plumber does not mean you are a good management consultant for plumbing companies.

The fact is, your road to the practice of your dreams is unique.

When ExecTech consultants visit your practice, they find problems you might be overlooking. They see underutilized strengths you might take for granted. They observe your staff and facility with a fresh perspective.

7. What Is ExecTech Coaching?

If you think you know it all, you live a dead-end life. You block yourself from the vast potential of new ideas and discoveries.

If you are open to learning new ideas, you can gain new skills that help you become rich, powerful and wise.

ExecTech coaching helps you to learn and implement people skills, productivity skills, staff management systems and a financial



management system. Prior to developing our coaching system, ExecTech consultants tried to teach these skills to our clients during consulting meetings. Yet we found a coach, with the sole purpose of making you more competent, can teach you these skills over the telephone.

Below are some of the skills you learn through ExecTech coaching modules.

People Skills: Forming strong relationships, opening conversations with strangers, resolving disagreements, making people like you, understanding others, being understood by others, helping people feel happier and handling difficult people.

Productivity Skills: Personal motivation, planning for productivity, handling distractions, step-by-step success formulas, professionalism, responsibility, having fun at work and personal power skills.

"The ExecTech coaching system was phenomenal. I not only went through the program myself, but I also got it for my office manager and my wife. It is helpful to anyone in terms of personal growth, personal management, time management, production, communication and staff management.

"I learned how to understand what's going on in people's minds so you can deal with them appropriately and in a way that can keep them happy."

Mark Hoffrichter, DDS

Staff Management: Staff meetings, inspections, organizing staff priorities, production meetings, good vs. bad communications, performance reviews, team building and managing by statistics.

Financial Management: Organizing practice finances, controlling spending, calculating overhead costs, cost reductions, internal audits, managing credit, determining spending priorities, orderly financial progress and planning for the future.

ExecTech also offers coaching modules to train your staff members. For example, "How to Answer the Telephone," "How to Turn Phone Shoppers into New Patients" and "How to Eliminate Missed Appointments." Staff members also thrive on the People Skills and Productivity Skills modules.

Benefits of Coaching

The tools and skills you learn from ExecTech coaching offer you immediate results, unlimited uses and long-term progress. Because coaching focuses on individual performance improvement, your top employees, associates and your spouse can all benefit from coaching.

> *"Through the weekly coaching sessions, I now handle issues with staff easily (rather than dread them like I used to). Coaching has also led to better personal relationships with my parents, kids, husband, in-laws and friends."*
>
> *Natalie Provenzano, DDS*

Coaching strengthens your personal power. For example, if you are having trouble with a difficult person, most coaching programs give you a lecture and wish you well.

With ExecTech coaching, you work out a step-by-step plan and then role-play with your coach until you are ready to confront the difficult person. Your coach then follows through with you, each week, until you have no more difficulties with the person.

8. How Will My Staff Be Involved?

Your staff members are a valuable resource for ExecTech and are treated with respect by our consultants and coaches. Their opinions, and the information they provide, help us see the big picture. Their assistance with gathering statistics and other data is essential to finding the causes of problems.



For example, as well as interviewing your staff members, we ask them to complete a 43-question questionnaire regarding their jobs and the practice.

We ask for their observations, concerns and opinions about you and the practice. We also look for employees with skills, qualifications and experience that show they are underutilized.

Your consultant will not bypass you and manage an employee for you, as that would hurt your practice. Instead, there are times when your consultant, you and key staff members will work together to implement new procedures. For example, you and your consultant may meet with your finance staff and role-play the best ways to collect money from patients.

Staff members usually agree with ExecTech's recommendations. They love the results: fewer confusions, bonuses they can earn on their own and personal recognition.

On the other hand, ExecTech might recommend you terminate employees who do not try to do a good job or who fight you.

Fortunately, nearly all employees support you and try to do their best. We know that replacing staff members is expensive, so firing them should be your last resort.

9. Does it Matter If One of My People Dislikes ExecTech?

Yes, and it's important that we resolve the conflict. In most cases, opposition to ExecTech's help is based on confusions about how ExecTech operates. Once we clear up the misunderstanding, most of your team members will support your interest in ExecTech.



Of course, a few may oppose ExecTech because they have a hidden agenda. In this case, ask yourself, "Why would anyone disagree with my efforts to improve my practice?" Or "Is there something this employee is afraid we might learn?"

Approximately 97% of your employees want you to succeed and will support your efforts to improve and grow. The remaining 2-3%, who secretly hope you fail, will certainly oppose an ExecTech program.

If you decide an employee must be terminated, your consultant will help you to minimize legal risks, prevent chaos and keep the process businesslike. We walk you through the legal land mines involved with employment termination and will recommend that you hire a labor attorney, when the situation requires it.

Sadly, many practice owners employ slow or weak staff members. They may be kind employees, but ineffective or fearful. They can create double work for you and your top people.

You might tolerate poor performers because you believe you cannot find anyone better. You might feel sorry for the individual and believe he or she cannot get a job anywhere else. Like most practice owners, you hate firing people you care about.

However, for the good of your other employees, your patients and your practice, you must make changes. Poor performers must either improve or leave. With ExecTech's help, you either correct and improve weak performers or kindly end their employment.



Finding new employees is another way ExecTech helps you. Showing you how to attract an abundance of job applicants, and then screen, interview, test and select the best of them, is easy with an ExecTech consultant at your side.

You deserve to have a competent, supportive team of great staff members.

10. How Long Will it Take Me to See More Profit and Less Stress?

Although you will see significant improvements by the end of the first year, most ExecTech clients enjoy greater profits and less stress within a few short months.

Your ExecTech program includes these steps.

- The process begins with an introductory consultation meeting with you. During this meeting we learn all we can about you, your practice, your goals and your challenges. We offer suggestions and ideas to give you immediate assistance and to ensure our approaches fit with your practice philosophy.
- Next, we present you with an Program Proposal tailored to your needs. Your proposal includes your goals, statistics, challenges and problems. It describes the objectives, solutions and systems ExecTech will help you implement, and the expected results. Your proposal also includes a list of ExecTech's responsibilities for your success, meeting details, your fee and payment options, and your expected benefits.

If you are not in agreement with your proposal, we will do all we can to modify it to your needs and wants.

- Once we agree on all of the details in your proposal, we sign a simple client agreement that protects all parties. As far as we know, ExecTech is the only consulting firm that offers a refund option if you are ever dissatisfied with your ExecTech program. The client agreement also provides you with as much confidentiality allowed by law.

- Next, you complete several questionnaires on our secure website. We need many details about your history, staff, contracts, fees, finances, personal matters and legal matters. Your spouse and staff complete online questionnaires, as well.

- Within 24 hours of enrollment, your consultant calls you to schedule your first consulting meeting, preferably that same week. Once your consulting has begun, your coach calls you to schedule your first coaching session.

- Throughout the year, you meet or talk with your consultant and coach each week. You take small, but important action steps that take you closer to your next level of success. You gradually replace bad habits as you implement new systems. You learn to track your weekly and monthly statistics to ensure you are making steady progress. You gradually take command of your practice and its growth.

- In addition to your consultant and coach, you have all the ExecTech backup staff on your team, including the Managing Partner, the Coaching Supervisor.

You may contact anyone in ExecTech at any time for any reason. Your success is our primary objective.

- Near the end of your program, your consultant will schedule an extra meeting to discuss your statistical results and the benefits you have gained from ExecTech. He or she will propose an ongoing program to accomplish new objectives, greater profit and more progress toward your biggest goals.

  Every month you spend without ExecTech means another month without the benefits we provide. For example, if we can help you increase your profit by $15,000 per month, each month of delay means a $15,000 profit loss to you.

  ExecTech does not just provide a body of knowledge for you to absorb; it is an ongoing support process. The skills you receive through ExecTech are permanent. Your investment is returned every year for the rest of your career. There is no limit to what you can accomplish with ExecTech on your team!

"Not only is our practice growing, but we are growing personally too.

"Coaching has been huge for me. It has changed my mindset. The training on effective communication and control were almost priceless.

"I am more confident in handling patients and staff"

Hua Gao, DDS



Your Potential

Right now, you are capable of making improvements to your practice that are more significant and satisfying than anything you have ever done before. You can shatter your past achievement records, eliminate your worst problems and feel absolutely great.



Most people have the wrong idea about success. They believe "you can only do so much," or "you just need to keep on trying" or "success takes time." Such thinking slows you down and limits your lifetime achievements.

To make a significant improvement in your career and your practice, you must jump out of your rut. You must overcome any addiction you have to safe, comfortable, conservative plans. You must break out of old patterns and find new success habits.

Instead of settling for "more of the same," do something bold and exciting. Reach for new levels of growth and accomplishment. After all, your potential is unlimited!

Your Next Step

Learn how ExecTech can help you increase your profit, reduce your stress and reach your goals. Contact us to schedule a free consultation.

During the call, we will learn about your practice, your goals, and the challenges you face. From there, we will schedule a free practice analysis telephone meeting. At this meeting, we will review your marketing, staff matters, patient management systems, collections, overhead, stress and profit.

We will also give you some specific ideas of how you can increase your profit or reduce your stress in the fastest, easiest ways possible.

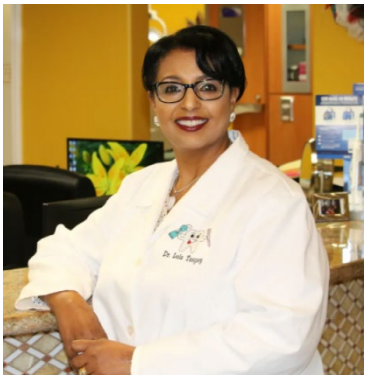
If after the practice analysis meeting you feel ExecTech might be a good addition to your support team, we will prepare a customized proposal of services and fee options for your consideration. Your proposal will include the problems we can help you solve, the systems we will help you implement and the results we expect you will receive.

We look forward to working with you!



Schedule Your Free Consultation

Client Testimonials



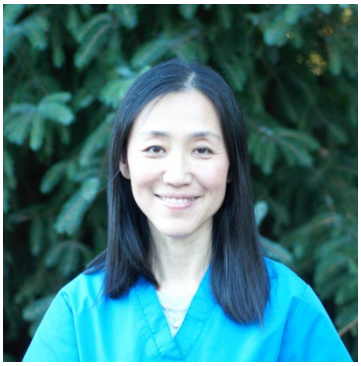
"**I started with ExecTech right after COVID hit**. Their management systems get implemented specific to your existing issues and greatly improves them.

"We continue to see the big impact their program has delivered to our office. This last month we reached our highest ever collections and got over 33 new patients within 18 working days.

"Month-over-month for the last year, we have averaged a 40% increase in revenue since working with them.

"I highly recommend them to any-sized practice!"

Lula Tsegay, DDS



"I used to feel like I was unable to motivate my team. My new patient numbers were down and my practice was stuck in a plateau. I then was referred to ExecTech by a trusted colleague.

"**Starting in 2021, my consultant and I started to set goals each month**. At first they seemed unreal but then I saw that we were reaching them and it kept us striving for more. I learned how to communicate with the team about the changes I wanted. My consultant role played with me and I applied this in both my practice and my life. I now have the basic skills for leadership and my team is more motivated.

"We learned the importance of getting referrals and how to do it. We did a monthly marketing meeting with the front desk to plan this out. We also created an attainable bonus system which was great!

"We set up structure in the practice. I started looking at the practice as a game rather than just work. The coaching has helped me reflect on myself and has helped me improve on things I did not even know I was missing.

"My consultant observes and guides me and I love that the ExecTech program is tailored to my needs. When I have a problem or need something there is someone I can bounce things off of.

"Since starting the program every month our numbers are better than the month before. We are in a higher level now. **Our production is up 20% and our collections went from 95% to 98.5%. It really helps to have someone pushing you. ExecTech is worth the investment!**

June Xiao, DDS



"My staff and I feel that ExecTech is the best consulting company we have ever hired. We have been using their management systems for the past eight years and our statistics have been in their highest ever range year-over-year.
I now have a team of over 100 employees, including 6 associate doctors, and they all feel so much more competent in their ability to control the practice with greater efficiency.

"I like the ExecTech program because they are very good at training the doctors and staff in doing treatment presentations and financial arrangements. They are also tremendous at helping implement a strategic plan that streamlines office flow and team performance.

"We have easily covered the expense of this program in a short time. We feel very excited about this very worthwhile investment in our practice which will pay dividends for many years to come."

Juan D. Villarreal, DDS



"In 2020, I did not have a system for running my practice. I struggled with marketing and management but knew there has to be a better way of going about it.

"I was introduced to ExecTech through an alumni colleague. My experience in the last year since working with them has been great. I have gained much more confidence about the practice and the big picture. Previously, our team was not stable and we lacked leadership skills to motivate them. I am happy to say our team is stable now.

"Our numbers have increased, procedures are better, we are working faster, and office management is much better. To have a more ideal practice was my main purpose in working with them. I now have less stress and more self- confidence.

"**We are growing personally too. Their personal performance coaching changed my mindset. Coaching has been huge for me. Their training on effective communication and control were almost priceless**. I am more confident in handling patients and staff now.

Hua Gao, DDS



“Before working with ExecTech I worked hard to try to take my practice to the next level. I needed guidance on how to get more new patients and increase production.

“Once I hired ExecTech that is when my practice really took off. I saw tremendous results right away and therefore continued working with them for seven consecutive years. As a result, new patients, production, and collections went up at least 10-15% every year consistently.

“**Hiring employees and staff management were big areas they helped me with**. Whenever I needed to hire they helped me find good applicants by using their online job application system. This helped so much as it took me a lot less time to research the prospective staff and streamlined the whole hiring process. Then once I hired new staff my consultant helped me train them which took a big burden off my shoulders.

“I also loved the way we increased the number of new patients because we did it mostly through internal marketing. We worked on increasing the quality of the patient experience and then what followed was patient referrals and increased patient number. We did not have to spend more money on advertising (and that is still true to this day)!

“Their one-on-one style of consulting face-to-face was the big difference from any other dental consulting company. In between meetings, whenever or whatever the problem was my consultant picked up the call or email and always answered me right away. This gave me great peace of mind and a lot less stress. I could always rely on him for help when I needed it.

“My practice has grown so much and I have a lot less stress thanks to the ExecTech. **I would say if you want higher production and collections I sincerely encourage you to call them! ExecTech gets results!**”

Aimin Liu, DDS



“I first heard about ExecTech during a talk at our local dental society meeting. During that talk, Clayton was able to pique my interest enough to make me inquire about their dental consulting services. Long story short, I am so glad to have met Clayton that night and also so glad to have had ExecTech on my side this past year.

"My experience with ExecTech has been nothing short of amazing. Our practice numbers have dramatically increased. I attribute much of this success to the guidance from my practice consultant. He has helped me to put systems in place to better communicate and motivate my staff. He has helped me to also analyze my practice more by numbers and less by "feel". We now consistently set monthly production, collections and new patient goals. **Year to date we have over 850 new patients in and our practice revenue is up over 30% from the previous year.**

"In all, I have really enjoyed working with the whole ExecTech team. If you are a young doctor looking for guidance on how to better manage staff and grow a young practice, you should strongly consider ExecTech. It has been a worthwhile investment."

Jonathan Chang, DDS



"I am very happy with the results of my ExecTech program. In my first six months on the program, not only did **my practice hit highest-ever numbers** in both production and collections, but my production is 26 percent higher than the six months prior to the program and my collections have increased by 25 percent.

"We achieved this by implementing ExecTech's practice management systems. We implemented their systems for finances and scheduling, which helped to decrease office stress and increase production. We also implemented internal marketing strategies which have helped us get new patients including big cosmetic cases.

"There is nothing about the ExecTech approach that I have found to be cookie-cutter in any way. I really like the way in which my consultant related to my practice and understood my concerns. He studied my practice and was able to teach me how to implement the specific systems that we needed. I especially like **ExecTech's hands-on approach, coming to my office and working with me and with my staff**.

"Another thing that I like about this program is that their goal is not to have me become dependent upon them. From the beginning, ExecTech's goal has been to teach me how to run my practice without my consultant. They are teaching me how to do it."

Dino Javaheri, DDS



"**ExecTech consulting and coaching are the best investments in my practice that I have ever made**.

"I interviewed many consulting companies in order to bring my practice to its full potential. Finally, I was impressed with ExecTech's thorough proposal and decided to work with them.

"I remember driving to my first consulting meeting thinking that there was no way that they could improve my office. But to my surprise, they have not only helped bring out my full potential as a dentist, but they have also significantly helped me increase my ability to effectively manage my staff.

"Thanks to the ExecTech program, my practice numbers continued to increase significantly every month. If you honestly complete the steps on the ExecTech “mini-programs” you will get the results. I have never been happier with my practice. I am now looking at opening a second practice.

"I have worked with a number of consulting companies in the years that I have been in practice **and I have never seen a consulting firm get the same level of results that I have achieved with ExecTech**. I am truly fortunate to have found them."

Lakshmy Sudeep, DDS



"I have been working with ExecTech for the past 2 years, and it has been a wonderful experience.

"Before hiring ExecTech, I didn't know how to be a manager of a business - they don't teach you that in dental school. I have learned so much from working with my consultant. He has taught me how to develop a successful internal marketing plan to bring in a steady stream of new patients, how to implement steps to keep my practice growing, and how to stay on top of my financials.

"Through weekly coaching sessions with my communications coach, I now handle issues with Staff easily (rather than dread them like I used to). Coaching has also led to better personal relationships through improved communication skills that I have learned. I now have a very happy Staff and each member knows that they play an integral role in our office Team, and I have the means to compensate them well. I know how to set production and collection goals and reach them. Our production has continued to increase, and I know the steps to implement to make it continue to increase.

"**My practice has grown to the point where I need a bigger space to accommodate it!** I have recently purchased a new building to move my practice to, and ExecTech has been with me every step of the way throughout the process. The skills I have learned from ExecTech will stay with me throughout my career, and the communication skills I have learned will stay with me throughout my lifetime. I cannot thank ExecTech enough for what they have taught me. Everyone I have dealt with at the company has been so helpful and knowledgeable.

"I can honestly say that hiring ExecTech has, by far, been the best business decision I have made. It has been worth every penny, and more!"

Natalie Provenzano, DDS



"One thing that I really like about the ExecTech program is the way that that my consultant and my coach have have helped me with hiring strategies. **I am now hiring the right people for my practice**, which makes management much easier than it was in the past. At the same time they helped me to improve my management skills, so that running my practice is now easier than it has ever been.

"This has allowed me to add two hygienists to my multi-specialty practice, which is allowing me to devote more time to my patients and my hygiene schedule has gone from marginal to full while the rest of my practice continues to grow.

"My collections are up significantly over last year!

"I am very grateful to the colleague who encouraged me to call ExecTech last year to find out how they could help me with my practice. If you are looking for someone to help you achieve your personal goals and your practice goals, **I encourage you to give them a call**."

Safa Khaleel, DDS



“Before reaching out to ExecTech, I had no control of my personnel. I had many staff issues that caused me a great deal of stress. I was unable to motivate my staff and their attitude was apathetic in the practice. I did not get compliance from them to perform tasks the way I wanted them to.

"Since working with ExecTech, my office now has structure and order in place. Together we implemented effective systems so I am able to manage the office with greater ease. I now get compliance from staff. This started to improve immediately when ExecTech helped me get up-to-date, and simplified, office policies in place.

"Looking back I felt there were never enough hours in the day to treat patients and manage the business. **ExecTech helped implement programs that freed up my time and lowered my stress**. I used to give orders to staff and had no way of knowing if they were done or what still needed to be done. This is no longer the case. ExecTech has great systems of practice management and communication that really work! I now manage my time and practice better. I no longer have the headache of trying to do everything myself which used to be so overwhelming.

"After going through ExecTech's program, I realized that the business aspect of the practice is just as important as the clinical aspect. Previously, I used to just look at the numbers and had no idea what they meant. My production and billings were declining and I did not know what to do about it. I had no marketing plan in place and my stress was rising. Now, I have an actual marketing plan and generating new patients has improved significantly. My production stopped declining and has actually gone up by increasing efficiency. I have so much less stress now!

"Coming from someone like me who was very skeptical of consulting help and was "shopping around", **I can honestly say that ExecTech Consulting is 100% the correct choice**. ExecTech's program is unique, customized, and local to ensure results and implementation. For me, greater life balance, practice organization, and profit increase has been absolutely amazing. **ExecTech truly is the best business investment you can make!**"

Ray Shirani, DDS



“Team performance is higher than ever and we continue to see month-over-month growth!

“We are also getting very positive feedback and reviews from our patients, and we have created so much valuable personal time for ourselves. This list is much longer, but I want to end by saying thank you once again to ExecTech."

Benjamin Rosales, DDS