



Missouri Dental
ASSOCIATION



***Building the Ultimate Practice:
Proven Systems to Increase
Practice Production Every Year***

Dr. Roger Levin

• has no financial obligations to disclose •

Friday, June 26, 2026

9:00a to Noon

Building the Ultimate Practice
Proven Systems to Increase Practice Production Every Year

Presented by:
 Dr. Roger P. Levin

Levin Group
 Increasing Practice Production
 Through Proven Business Systems

Prepared for:
 MDA Missouri Dental Association

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To increase your practice income and reduce stress through the implementation of proven business systems

Seminar Objective

2

Did You Know...?

1. Every practice has a 30-50% growth potential
2. You can increase your revenue by \$15-\$20 million over the course of your career
3. You can reach financial independence 10 years earlier than the average dentist retirement age
4. You can increase income and profit every year
5. You can achieve a low-stress, high-production practice - It's being done now

3

What Are Your 5 Biggest Practice Challenges?

1. _____

2. _____

3. _____

4. _____

5. _____

💡 "In the middle of every difficulty lies opportunity." – Albert Einstein

4

Top 8 Challenges Facing Dental Practices


Dental Economics/Levin Group Annual Practice Survey - March 2025

- Rising overhead
- Ability to hire trained clinical staff
- Declining insurance reimbursements
- Not enough new patients
- Patient concern about their finances and the economy
- Ability to hire trained office team members
- Not enough active patients
- Competition from other dental practices

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The 10 Question Assessment

6


 **The 10 Question Assessment**

1. Has the practice increased production in each of the last 5 years?

Yes No




7


 **The 10 Question Assessment**

2. Will production grow by 18% this year?

Yes No




8


 **The 10 Question Assessment**

3. Is the practice collecting over \$1,200,000 per doctor?

Yes No




9


 **The 10 Question Assessment**

4. Is your schedule mathematically designed to achieve an annual production goal?

Yes No




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
 **The 10 Question Assessment**

5. Are all day-to-day operations carried out using proven, documented, step-by-step business systems?

Yes No




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
 **The 10 Question Assessment**

6. Has doctor income increased by at least 10% in each of the last 5 years?

Yes No




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
 **The 10 Question Assessment**

7. Is overhead 59% or below?

Yes No




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
 **The 10 Question Assessment**

8. Are collections 98% of adjusted production?

Yes No




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
 **The 10 Question Assessment**

9. Does every staff position have an up-to-date (within 18 months) detailed job description?

Yes No




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 **The 10 Question Assessment**

10. Do you have 20 KPI's for measuring practice performance?

Yes No





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The 10 Question Assessment

“Yes” Score: ____/10


The goal is to score 9 out of 10 (or above)

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The Ultimate Practice Goal Is Production


- Production is the single most important metric in any dental practice (increase every year)
- Production should grow every year
- Most practices are 30%-50% below revenue potential



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Systems Are The #1 Factor In Practice Success

Your success will be directly proportional to the quality of your systems



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21 Ways To Increase Production...

...And Lower Overhead

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21 Ways To Increase Production and Lower Overhead

- 1. Reactivate Inactive Patients
- 2. Accelerated Schedule
- 3. New Patient Appointments

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21 Ways To Increase Production and Lower Overhead

- 4. Longer Appointments
- 5. Diagnose All Periodontal Disease
- 6. Catch Up X-rays and Fluoride

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21 Ways To Increase Production and Lower Overhead

- 7. Hygiene Should Identify Dentistry and Pre-present
- 8. Fluoride For Adults
- 9. Collections

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21 Ways To Increase Production and Lower Overhead

- 10. Add 2 Months Per Year
- 11. The Power of Interest-Free Financing
- 12. Present Ideal Treatment – Don't Confuse The Patient

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21 Ways To Increase Production and Lower Overhead

- 13. January – Insurance Renewed (Get Patients Scheduled)
- 14. September – Inform Patients of Remaining Benefits
- 15. Bring in More Services

25

21 Ways To Increase Production and Lower Overhead

- 16. Don't Treatment Plan Based On Insurance
- 17. Same-Day Treatment (Hygiene to Dr. and Dr. to Hygiene)
- 18. Ask For Referrals

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21 Ways To Increase Production and Lower Overhead

- 19. Increase Fees Every Year
- 20. Daily Business Meeting With Goals
- 21. Power Hygiene Days

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Leading Your Way to a World Class Practice

Essential Leadership Skills for the Entire Team

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1: Effective Communication

- The 3 C's of communication
- It's not what you say, it's how you say it
- Transparency



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2: Learning Agility

- Lifetime learners
- Self-improvement junkies
- Readers are leaders (How many books have you read this year?)

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3:
Respectful


-  To the team
-  To the patient
-  To everyone

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4:
Low Drama




-  Hero
-  Villain
-  Victim



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5:
Integrity

-  What you say
-  When you say it
-  Do what you say you are going to do

33

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6:
Resilience

-  There will be storms
-  Calm and confident
-  Rational and inspirational
-  Solution focused

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7:
Delegation – Level IV Leadership

- Level IV – Happy and Lucrative
- Level III – Overwhelmed and Stagnant
- Level II – Achieving Below Potential
- Level I - Achieving

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8:
Ask Lots of Questions

-  Leaders Are Curious
-  Leaders Love to Learn
-  What Don't You Know

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9:
Energy Management

- Habits → Rituals
- Renewal
- Fitness

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10:
Time Management

- Focus On The Priorities
- Daily To-Do List
- Set Goals

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11:
Leaders Have To Make Hard Calls

- They Don't Ignore Things
- They Don't Procrastinate
- They Act !

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What gets measured,
gets done.

Peter Drucker
Business Educator and Author

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How The Highest Achievers Create
Their Future

1. Identify a detailed vision
2. Set exact goals to make the vision happen
3. Do not wait or procrastinate
4. Do not get distracted
5. Excel at saying "no"

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How The Highest Achievers Create
Their Future

- They know what they want, when they want it
- They keep their eye on the ball
- The course correct as needed
- They surround themselves with experts

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Goals

- The first thing you should do every year!
- Set defined goals to make your vision happen.


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Goals Must Be...

- Written
- Measurable
- Deadline


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Goals Build a World Class Team

- Individual performance
- Team performance
- Practice performance

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Give Every Team Member 1 – 3 Goals

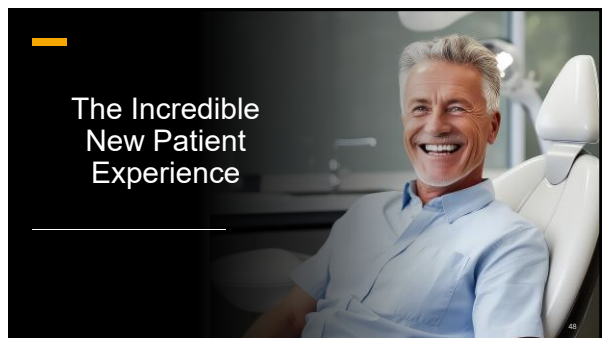
- Motivating
- Clarifying
- What gets measured – gets done!

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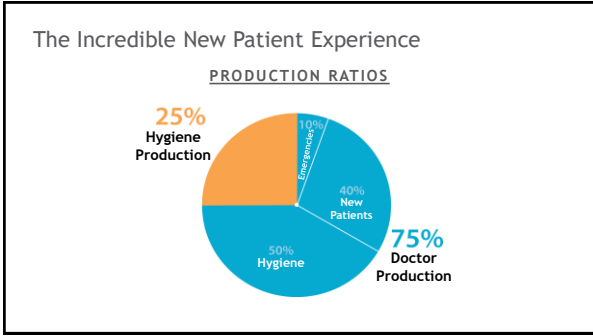
Example – 10 Goals for 2026

Goal	Measurement	Deadline
1. Increase production	18%	12/31/26 (track monthly)
2. Increase profit	18%	12/31/26 (track monthly)
3. Increase new patients	12%	12/31/26 (track monthly)
4. Launch product sales	\$25,000	12/31/26
5. X-rays and fluoride tx	90% of pts up-to-date	6/30/26
6. Reduce overhead	- 3%	1/31/26
7. Increase veneer cases	+ 2 / month	1/31/26
8. Reduce no shows	- 2%	3/31/26
9. Reorganize storage area	Inspection	2/25/26
10. Reduce doctor time/hour	+ 32 days equivalent	6/30/26

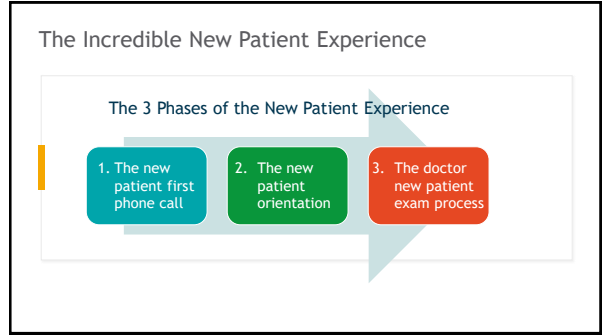
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The Incredible New Patient Experience

The New Patient - 1st Phone Call

- Smile before answering the phone
- Answer the phone in two rings
- Greet the patient with caring, compassion and V.I.P. excitement

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The Incredible New Patient Experience

The New Patient - Orientation

- Have an extremely positive and enthusiastic scripted New Patient Orientation
- The New Patient Orientation is highly customized for each practice

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The Incredible New Patient Experience

The New Patient - Orientation

- Schedule all new patients 20 minutes prior to the appointment
- Be prepared for the new patient and identify them in the Daily Business Meeting
- Remember, all new patients are V.I.P.s

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The Incredible New Patient Experience

The New Patient - Orientation


- Greet the new patient by standing up and coming in front of the desk
 - ✓ This removes any physical barrier and enhances relationships
- Shake hands, smile and make eye contact

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The Incredible New Patient Experience

The New Patient - Examination Process

- Assistant is introduced to new patient by the front desk coordinator
- Assistant shakes hands, smiles and makes eye contact
- Assistant escorts the patient to the clinical area




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The Incredible New Patient Experience

The New Patient - Examination Process

- Assistant completes the 2-minute Relationship Building Drill
 - ✓ Learn 1-3 personal facts
 - ✓ Learn chief dental complaint
 - ✓ Learn why patient came to your office
- Assistant introduces the new patient to the doctor




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The Incredible New Patient Experience

The New Patient - Examination Process

- Assistant promotes doctor
- Assistant introduces doctor to the patient
- Assistant communicates any special information to the doctor




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The Incredible New Patient Experience

The New Patient - Examination Process

- Doctor shakes hands with the new patient
- Doctor sits at eye level with the new patient
- Doctor never touches a new patient until they have learned 10 things about them - The Golden 10




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The Incredible New Patient Experience

The Golden 10 Exercise

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.




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The Incredible New Patient Experience

The New Patient - Examination Process

- Doctor interviews new patients to gain an understanding of them.
- This goes to the heart of making patients your friends.



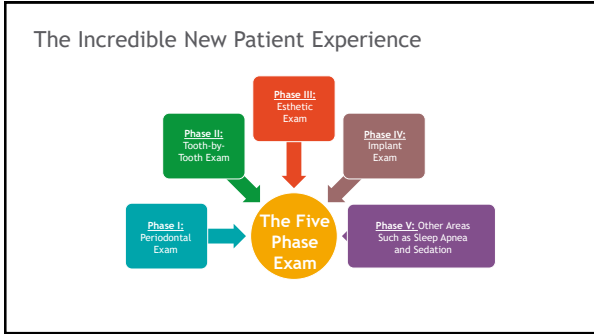
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The Incredible New Patient Experience

The New Patient - Examination Process

- People like their friends
- People trust their friends
- People like to buy from their friends
- People refer to their friends
- People accept case recommendations from their friends

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The Incredible New Patient Experience

The Five Phase Exam

- The exam process is meant to educate patients about each phase individually
- Follow-up consults are critical
 - ✓ All consults should be scheduled within 7-10 days of The Doctor New Patient Exam

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Implementation Case Study

Putting This Into Practice

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Case Study

Practice Profile

- North Florida location, owner in practice 19 years
- Annual production of \$1,155,000
- Married with three children moving toward college age
- \$152,000 remaining in student loans
- Four treatment rooms
- Four-day-per-week schedule

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Case Study

Doctor's Goals

1. Return practice production to positive growth
2. Position practice to better compete
3. Get on track for retirement savings

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Case Study

Practice Analysis

- Practice was below the 70th percentile in many key targets
- Practice declined >11%
- Two DSOs opened offices within one mile
- New patients declined in last two years by 23%
- Reported high stress level
- There were no documented systems



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Case Study

Practice Analysis

- Long-term staff focused on maintaining the status quo
- Practice had enrolled in two new insurance plans without acquiring many new patients
- Open time in the schedule
- No-shows at 4.3%
- Case acceptance below 50% for cases >\$1,500



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Case Study

Implementation

- Clear mission statement established
- Set 12 measurable goals to achieve in 12 months
- 23 targets were established
- All systems were upgraded or replaced
- New schedule was mathematically designed and implemented to meet revenue goals

IMPLEMENTATION

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Case Study

Implementation

- All new systems were documented with checklists for detailed staff training
- Overdue patients went from 4.9% to < 2% within 90 days
- No-shows decreased to < 1% within 90 days

IMPLEMENTATION

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Case Study

Implementation

- Staff became energized about new systems and clarity around their jobs
- Daily Business Meetings and Monthly Business Reviews were implemented
- Scripting was developed for all routine conversations

IMPLEMENTATION

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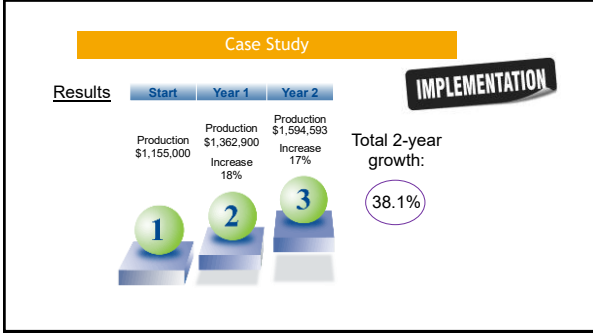
Case Study

Implementation

- A scientific internal marketing program was implemented increasing patient referrals within 60 days
- Program to remind patients to post reviews resulted in 130 "5-Star" reviews in first 12 months

IMPLEMENTATION

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10 Improvements We Will Make

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- ## 10 Improvements We Will Make
1. _____
 2. _____
 3. _____
 4. _____
 5. _____
 6. _____
 7. _____
 8. _____
 9. _____
 10. _____

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Building The Ultimate Practice

Proven Systems to Increase Practice Production Every Year

Thank you

Dr. Roger P. Levin

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