

Comprehensive Coaching Services

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Comprehensive Practice Analysis

A comprehensive Practice Analysis, in writing, detailing the practice area(s) most in need of attention/work to achieve profitability. These will be presented in order of most to least necessary; the Client may choose to rearrange the order of importance before we begin training or making changes. One comparison of the practice fees against a fee survey from Dr. Udell Webb, to determine the best pricing strategy for the practice. A copy of our proprietary Financial Agreement System. We require remote log-in to your system to access reports/fee schedules/etc. and prefer to work on a little used workstation to access data as needed.

2

Continuing Education Credits

Up to six hours of Continuing Education Credit through the Academy of General Dentistry, provided eligibility requirements are met. The entire team may access this training, which is tailored to the needs of the business. Clients and teammates must submit, and pass, a test related to training for CEU's if the training is administered remotely. If done in-person, every attendee must sign a roster and complete a speaker assessment. Certificates will be delivered via email so the Client can distribute certificates internally, plus have a copy for their own records. No CEU's will be given unless AGD requirements are met.

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Continuing Education Credits

Two doctor calls/Zoom meetings per month; these tend to run 45 minutes to one hour in length. If preferred we can work with/through practice management personnel (your office or operations manager) through conversation, email, and teleconference, provided the doctor(s) will act on initiatives. Email and text communication are included and expected; we reserve the right to ask for additional calls or communication as needed. Separate individual or group employee trainings via Zoom™ will be scheduled at the request of the Coach or based on the needs of the Client.

4

Human Resources support including:

- Our eight-step "Hiring For Success" program, which will ensure you layer the most qualified and behaviorally compatible employees into your practice. We will write and place ads, screen applicants, assess and provide background checks and references for each applicant. Client will be billed separately for ad expenses.
- Recruiting and training of team members (regardless of position) including Associate Dentists or Locum Tenens Dentists
- DISC Assessments for all team members; the practice may contract separately for a Team DISC Assessment
- Mediating serious discussions or asking for improved performance with documentation
- Recognizing and rewarding excellence in your team and setting up systems for improved teamwork and cooperation
- Clinical efficiency review and training
- Office manual creation or edits as requested
- Software training, deployment, or upgrade management

5

Accounts Receivables or Reimbursement support

- Detailed review of insurance plan reimbursement and support in adding/dropping plans
- Collections systems training or modification
- Systems Implementation for claims processing software
- Bookkeeping support as needed

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Credentialing for new locations, providers, or plans as requested.

This includes:

- Initial information gathering and accuracy review of provider verifiable history
- Exhaustive review of all insurance lines and subsidiaries for a complete roster of applicable companies
- Application completion and submission
- Spreadsheet monitoring for all applications and approvals
- Weekly delivery of updates, milestones, challenges, and successes in written form
- All contracts followed through to completion

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Marketing

- Logo, printed materials, including NP forms, and website reviewed as needed to drive business
- Logo and collateral design as needed. This service includes up to 15 designs and unlimited revisions
- Web design, including stock photos, descriptive text and the placement and identification of your own office photos. Hosting and domain costs are the responsibility of the Client. If you already have a website, updates are available, dependent on the program in which your site was created. Your online image has never been more important.
- Social media startup and/or weekly placement; these posts will be created including risk reduction offers and messages in line with the practice's branding initiatives. *We must be made administrators on your social media to perform these tasks.
- Design and placement of all print advertisement. During the contract period Coach Dentists will create a full line of print ads, brochure, practice flier and any other marketing items necessary for the promotion of the Client's practice. These designs are owned by the Client and used as appropriate. We do reserve the right to use any design created in our portfolio of work.
- Exterior sign design, bids and scheduled placement, coordinated by our team
- Exterior LED sign marketing. We generate a monthly/quarterly excel spreadsheet of marketing initiatives to be placed on your sign. We do this work through remote access to your system or a laptop controlling the sign itself.

Marketing systems and processes are structured so the Client receives the greatest return on investment. The speed and extent of external marketing initiative rollout will be controlled by the Client. The client is responsible for all printing, reproduction and postage costs. Written approval of all pieces is required before going to print. Once approval has been given, errors on the part of any third-party printer or advertiser are not the responsibility of our team.

