

An Organized Office Is a Successful One

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So many offices seem to have virtually no idea of my definition of *organization*. Usually I see nice neat offices with things placed in proper positions. You know, all the note pads and pens are nice and tidy, and all the papers and charts are stacked neatly on the corner of each desk. This stuff is what I define with the term *orderly*. In my world, this is very different from organization.

From my perspective, an office is organized when everyone working there knows their stations and duties, has a product for each station, has quality control in place for each station, knows the timeline to produce their product, knows whose station is in sequence before theirs (and whose follows), has a reporting system in place for their station that can be presented to management, and knows who to go to if their station needs help.

You may be thinking, *What are you talking about? This is what big companies do; it takes a lot of know-how to set this up.* Yes, this is what big companies do. How do you think they became big companies? All successful companies, no matter how big or small, have some form of [this type of organization](#).

Say you notice that you are not getting enough patients in this week and things are a little slower than usual. What do you do? Most rally the troops, throw ads in the paper, do promotions, give lectures, etc. While these are good things and should be done, why take a "shotgun" approach? If you are organized, you will know exactly where the weak link is:

- If your phone is not ringing, you have a marketing problem.
- If it is ringing, but patients are not coming in = front-desk problem.
- If it's ringing, patients are coming in, but not signing up with care = doctor problem.
- If it's ringing, patients are coming in and signing up for care, but not getting better = care plan problem.

It can go to much deeper levels, but this is a good starting point. If you determine where the block is, then you can go to that station, evaluate the problem and determine how to correct it.

Here's a good example: Say your phone is ringing off the hook, but no one is coming in to see you. Great, now you have honed in on the front desk. Check their stats and protocols. How are they answering the phone? Are they directing the patient or is the patient directing them? Are missed appointments called within 15 minutes and recalled later? Are missed appointments getting passed to the "loss prevention" department. (yes that is a vital department)?

Are [front-desk staff](#) going over their daily/weekly goals? Are they getting patient demographics? Do they know what their product is? Are they warm and friendly, always smiling before talking? Are personal/professional issues affecting their job performance?

These are just a few considerations, but you get the idea. With organization, you are directly identifying the area at fault - not just throwing money out the door for more advertising (your phone is already ringing) or wasting other staff members' time.

Your front desk goals might be to handle all incoming calls, get basic patient info (don't need to know pets, what they had for dinner, etc.), direct the patient (take control of the situation from the start), get the patient in that day or ASAP, gather all pertinent records for the Doctor, monitor the schedule and update constantly, keeping the down times to a minimum, keep producing their station's product (*see possible product below*), and process and collect all co-pays and other monies. A disorganized or weak front desk can be the *kiss of death* for any office.

So, what is the front-desk product? Well, it can be anything you want. I like letting front-desk staff come up with the product themselves (under management direction and approval). This way, they make it their own and they know it. An example might be simply: *To have a promptly scheduled patient that shows up on time, pays their bills on time, and schedules more appointments.*

You should do this with all the stations of your clinic. Then have someone put it all in manual form. Each station should have its own manual and log sheet, and a staff person to manage it. Each week, have a meeting with all the staff (bring lunch in) and have each station present their stats for the week. You can even set up an internal random chart review program.

This is basic information to help get you started; you can customize your own program to fit your staff size and office. Now go get organized.

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