

Give Patients What They
Want

PCSO 2019

Honolulu, HI

Dr. Ben Fishbein

fishbein FUNDAMENTALS





Dr. Ben Fishbein

Originally from Baltimore, MD

Met my wife in residency, moved to her hometown of Pensacola FL

Worked in a corporation for a year

Bought a small practice in Pensacola FL



fishbein
ORTHODONTICS

Our Story

2013

Purchased small practice from Dr. Austin. Became Austin & Fishbein Orthodontics.

2013

Attempted to make no changes to the practice. No growth and 2 doctor salaries.

2014 - 2015

Started to make changes. Previous doctor retired.

austin
fishbein
ORTHODONTICS



Our Story (2015)

Fishbein Orthodontics



Removed 'Grading' Patients – At initial phone call, Credit Check, etc.



Flexible Financing



Started Direct Marketing



Reduced New Patient Exam Time



(2013)

6 Team Members

2 Offices



80+ Team Members 8 Offices

LIVE • LAUGH • SMILE



Our Story (2016)



Continued to Grow

Opened 3rd office (Pace, FL)

Our Story (2017)



Opened 4th office (Crestview, FL)



Expanded and Remodeled Navarre Office



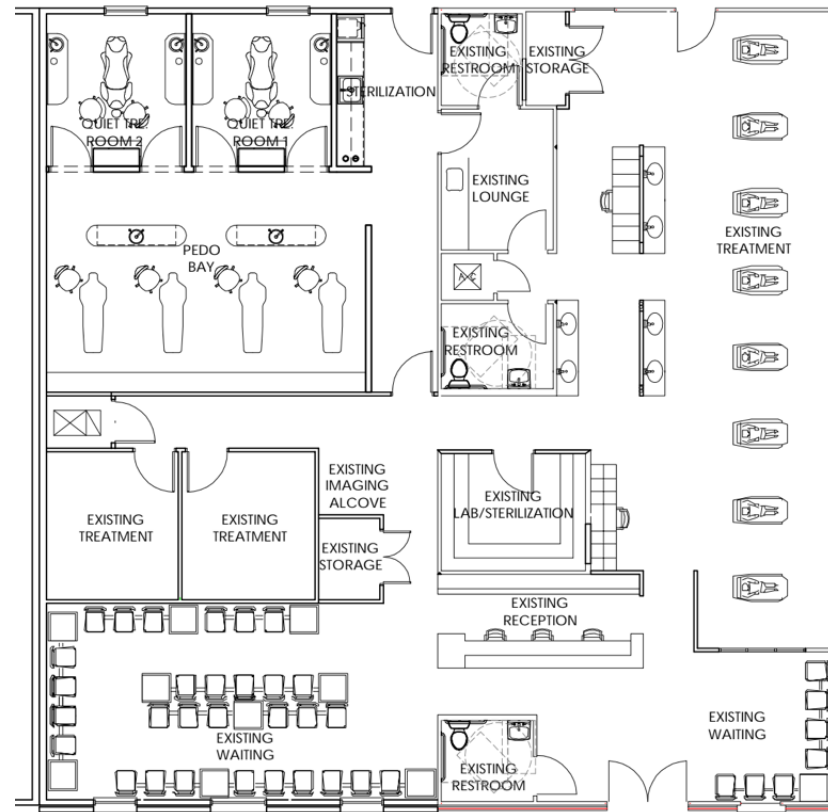
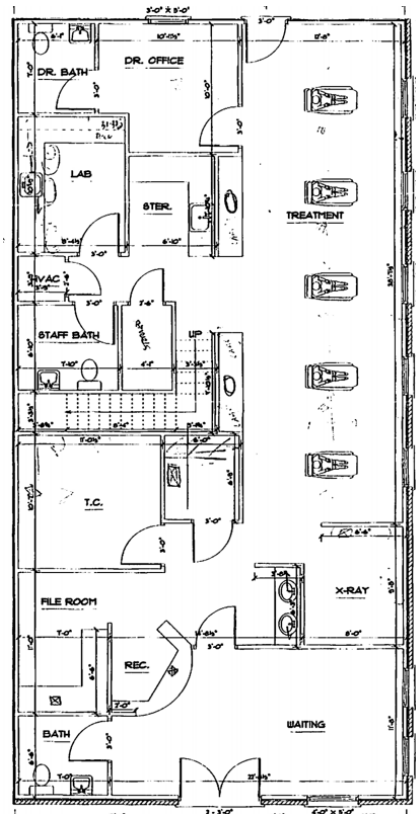
Dr. Sarah Howle joined our team





Navarre Office

1800 sq ft → 3600 sq ft



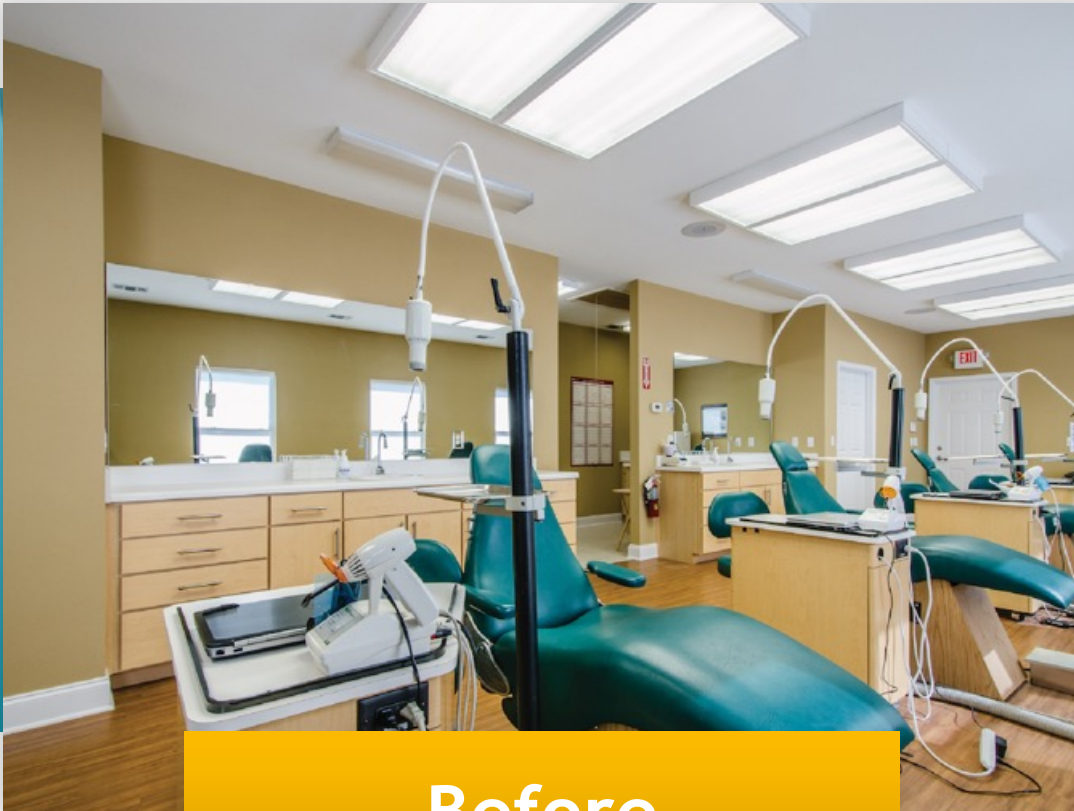
Navarre Office - Before



Navarre Office - Progress



Navarre Office

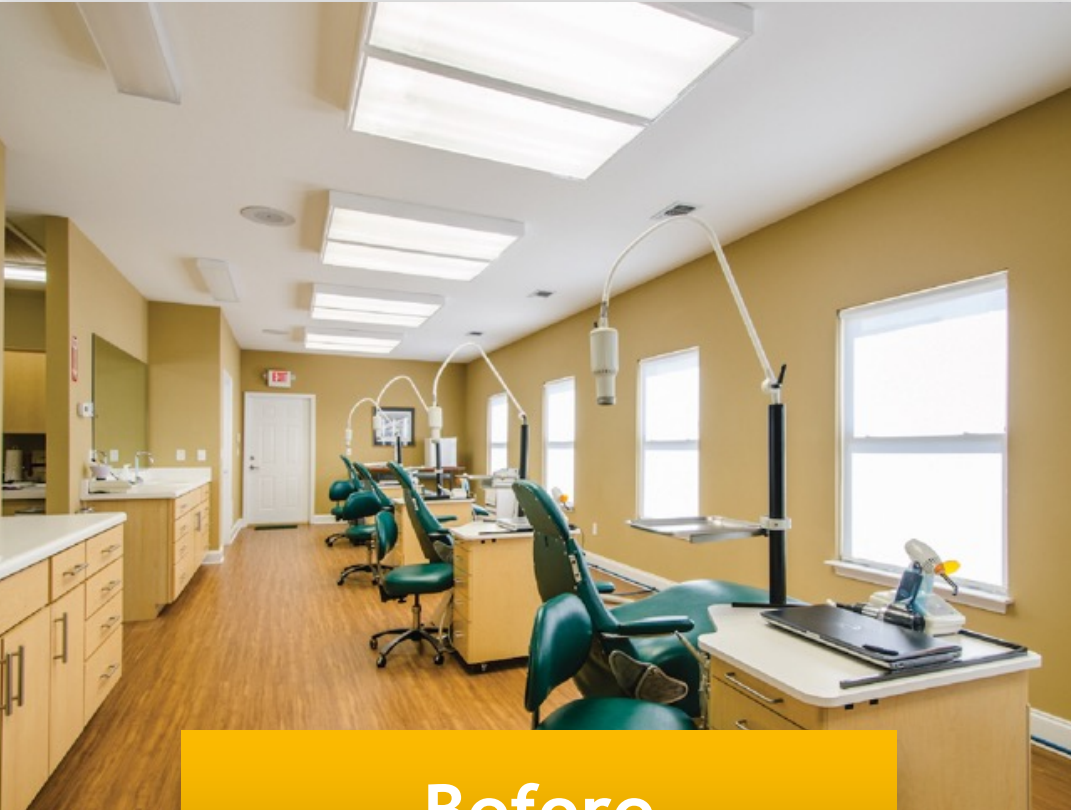


Before

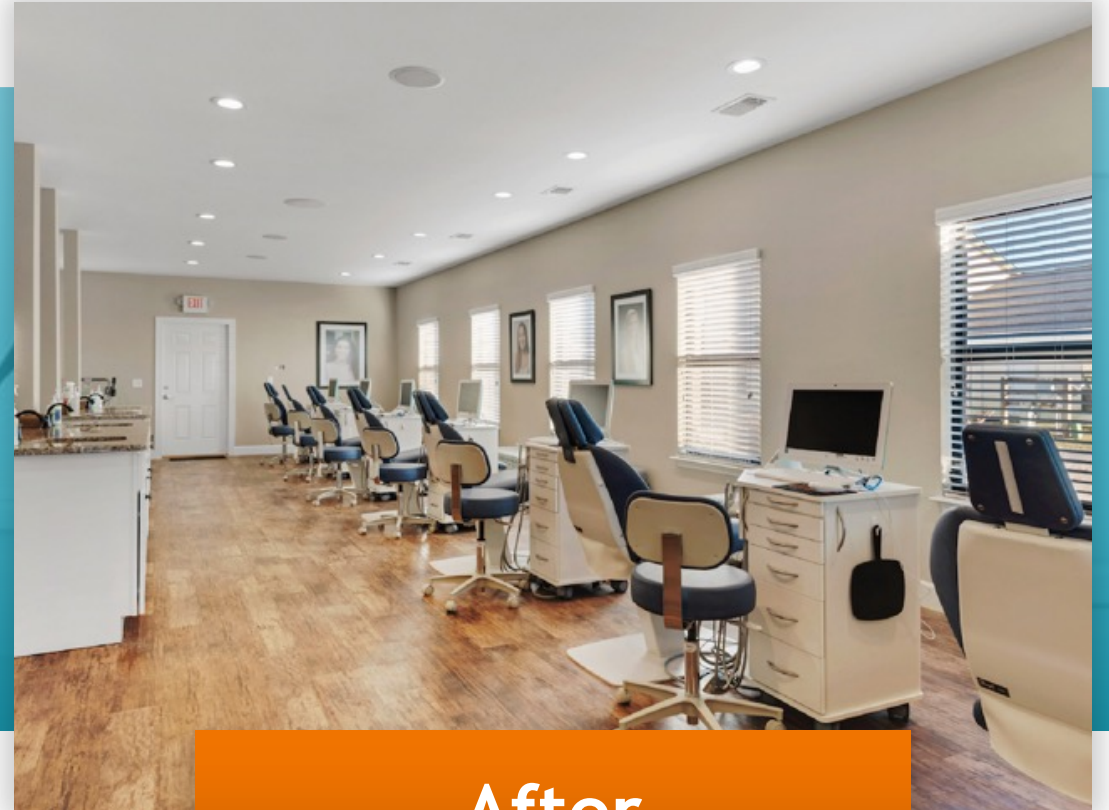


After

Navarre Office



Before



After

Our Story (2018)



Opened 5th and 6th offices
(Fort Walton Beach and Perdido)



Dr. Rezaie joined our team



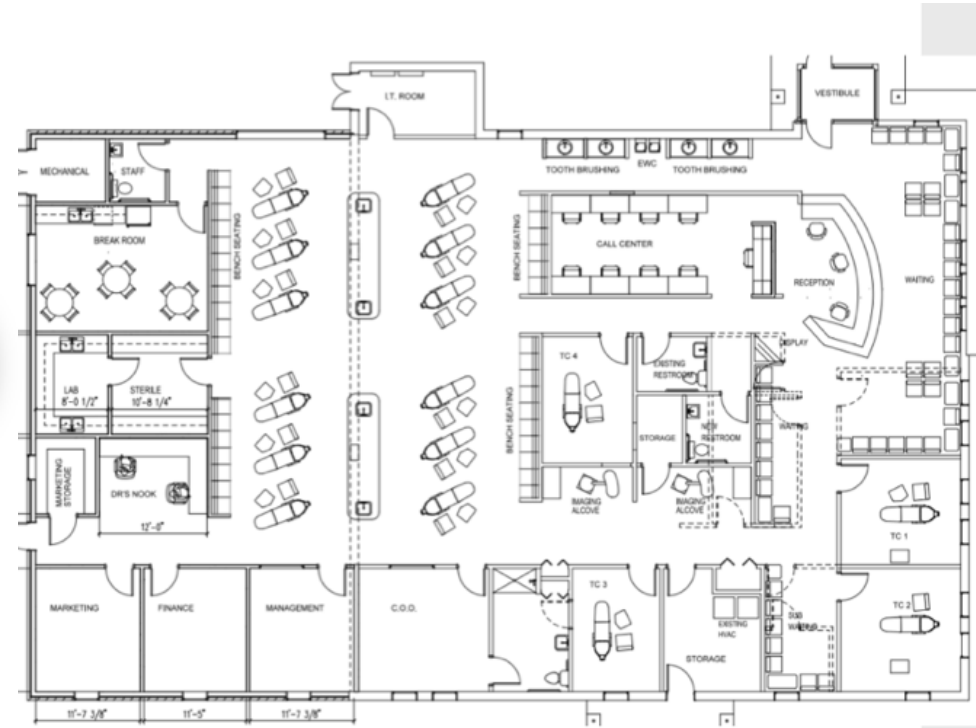
Expanded and Remodeled Pensacola office



Added Call Center



Started Fishbein Foundation





FLOOR PLAN
SCALE 1/4" = 1'-0"



fishbein
ORTHODONTICS

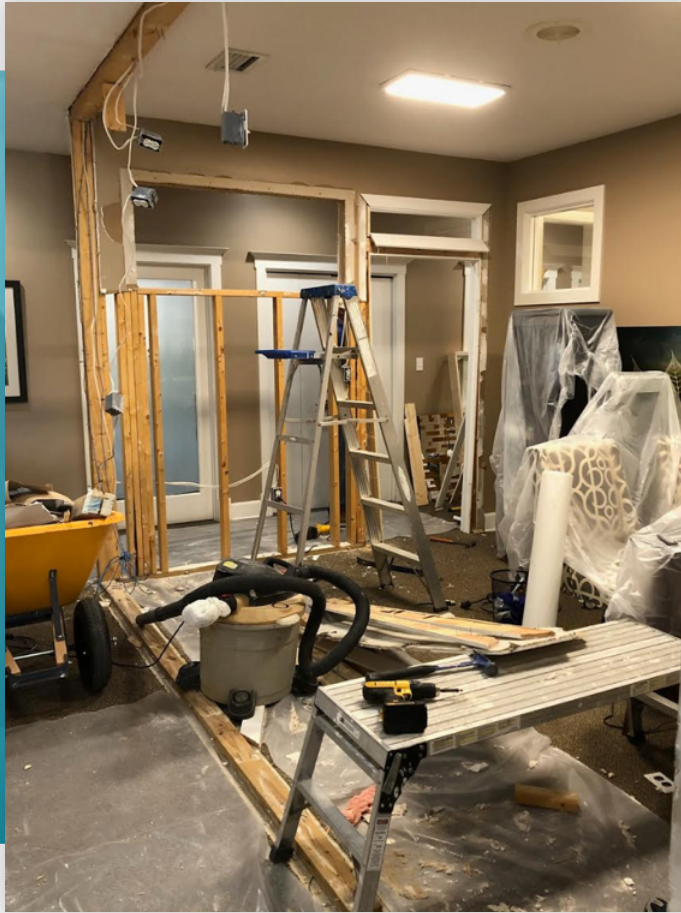
Pensacola Remodel - Before



Pensacola Remodel - Before



Pensacola Remodel - Progress



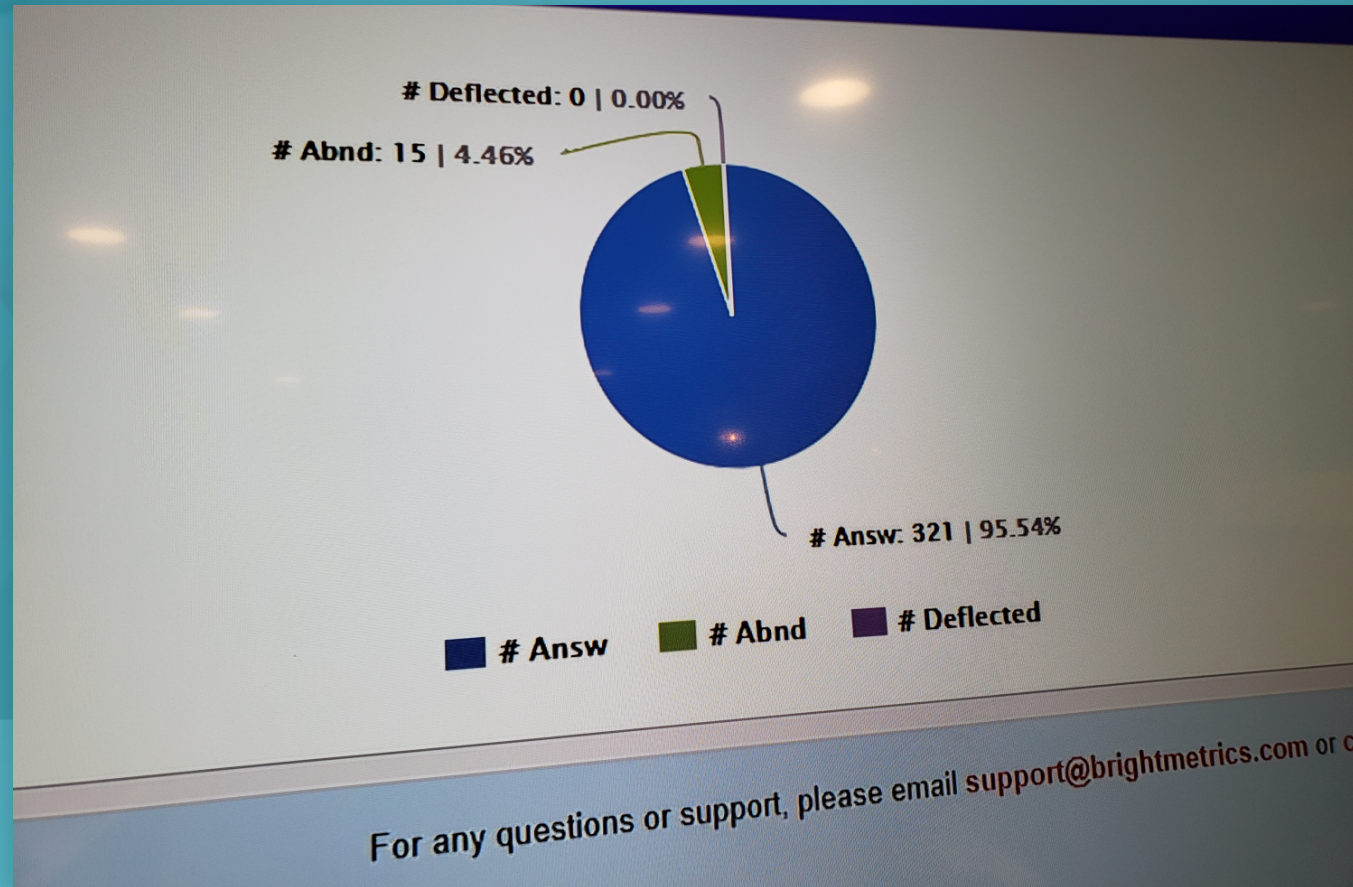
Pensacola Remodel - After



Pensacola Remodel - After



‘Team members respect what you inspect, not what you expect’



Our Story (2019)



Opened 7th and 8th offices
(Niceville and Cantonment)



Dr. Demoya joined our team



80+ Team Members



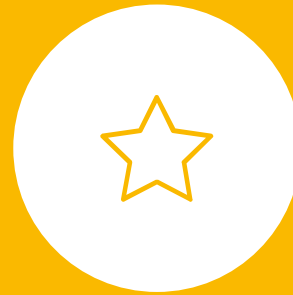
New Patient Systems

What do Patients Want?



Experience

reputation of practice,
comfort or discomfort of
visits, 5 senses, results,
updated attractive
offices



Convenience

of visits, length of
visits, travel to office



Value

Price, down payment,
insurance, monthly payments,
Value-adds (lifetime retainers,
whitening, cosmetic upgrades –
Invisalign)

New Patient Process (2013)

Consultation (90 Minutes)

Diagnostic Records (60 Mins)

Prophy / Separators (30 Mins)

Band Placement

Initial Bonding (120 Mins)

2-4 week process

New Patient Process (2018)

Consultation (30 Minutes)
*Same Day Invisalign Itero Scan
or Braces*

30 Minutes

Dental Clearance Policy



DENTAL CLEARANCE FOR ORTHODONTIC TREATMENT

At Fishbein Orthodontics, we recommend that our orthodontic patients complete all necessary dental examinations, hygiene services, and restorative care prior to starting orthodontic treatment.

Patient Name: _____ DOB: ____/____/____

- Date of last examination and x-rays: ____/____/____
- Date of last hygiene visit: ____/____/____

If any periodontal or restorative treatment is yet to be completed, please provide details:

☐ Please contact me about this patient before proceeding with treatment.

Orthodontic appointment scheduled: ____/____/____

Thank you for taking the time to review, complete, and fax or email this form. We look forward to working with you to provide optimal orthodontic care for our mutual patients.

Doctor or Supervisor's Name: _____

Doctor or Supervisor's Signature: _____ Date: ____/____/____

Please fax the completed form to 850-479-3548 or email to info@fishortho.com as soon as possible. Thank you!



CLEARANCE APPROVAL FORM

Thank you for trusting Fishbein Orthodontics with your patient's orthodontic needs.

Dr. _____ is recommending that _____ clearance
(Orthodontist) (Type of Clearance)

be completed before _____'s next appointment, which is scheduled
(Patient)

for ____/____/____.

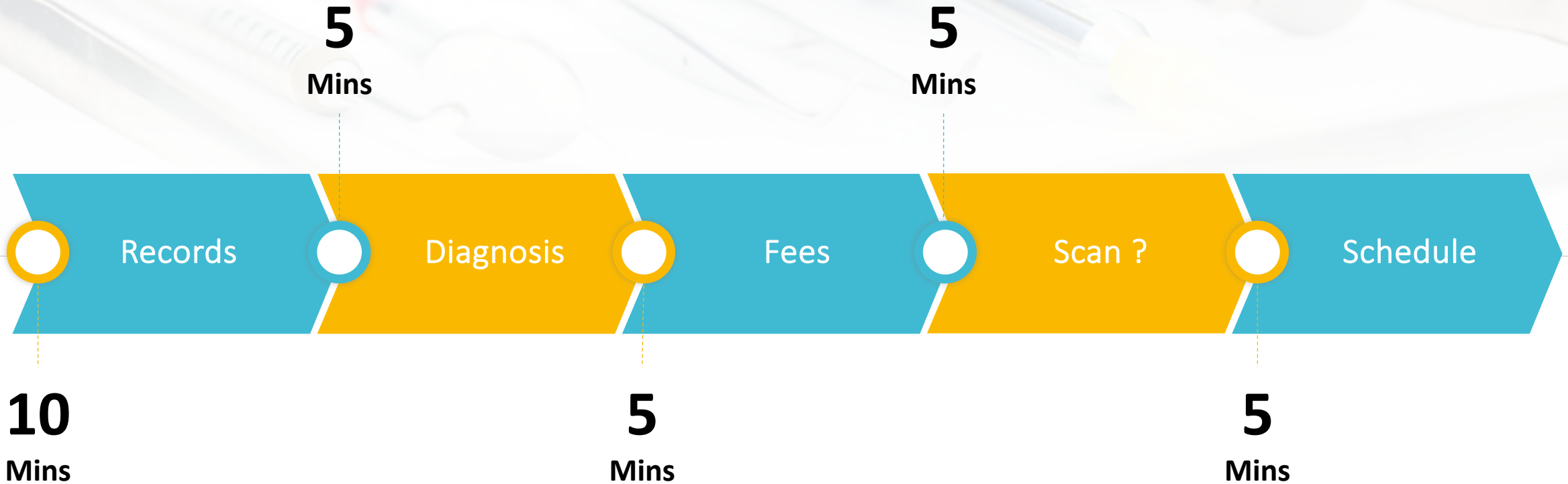
We are sending this along with the referral so that we can seek your approval to get started with orthodontic treatment. Please sign and return once our mutual patient's clearance has been approved.

Doctor or Supervisor's Name: _____

Doctor or Supervisor's Signature: _____

Date: _____

Timeline



The 30 minute 'Convenient' Consult



What We Ask Every Mom At The Consultation

Do you still wear your retainers?

Would you like Dr. Fishbein to take a
look at your teeth too?



Anticipation

“I skate to where the puck is going to be, not where it has been.”

Wayne Gretzky



invisalign®

Invisalign Vs. Braces (2013)

Invisalign

Braces

Total Cost



Down Payment



Monthly Payment



Doctors Recommendation



Which one do you think most patients chose?

<5% Invisalign

Invisalign Vs. Braces (2019)

Invisalign

Braces

Total Cost

Same

Same

Down Payment

Same

Same

Monthly Payment

Same

Same

Doctors Recommendation



Which one do you think most patients chose?

~30-40% Invisalign

Whoever Makes It Easiest Wins

Remove Obstacles to Treatment

Braces Down Payment

Same

Invisalign Down Payment

Same



How Is It The Same Price?!

“Your not paying for the appliance, your paying
for our doctors expertise”

Invisalign → Braces

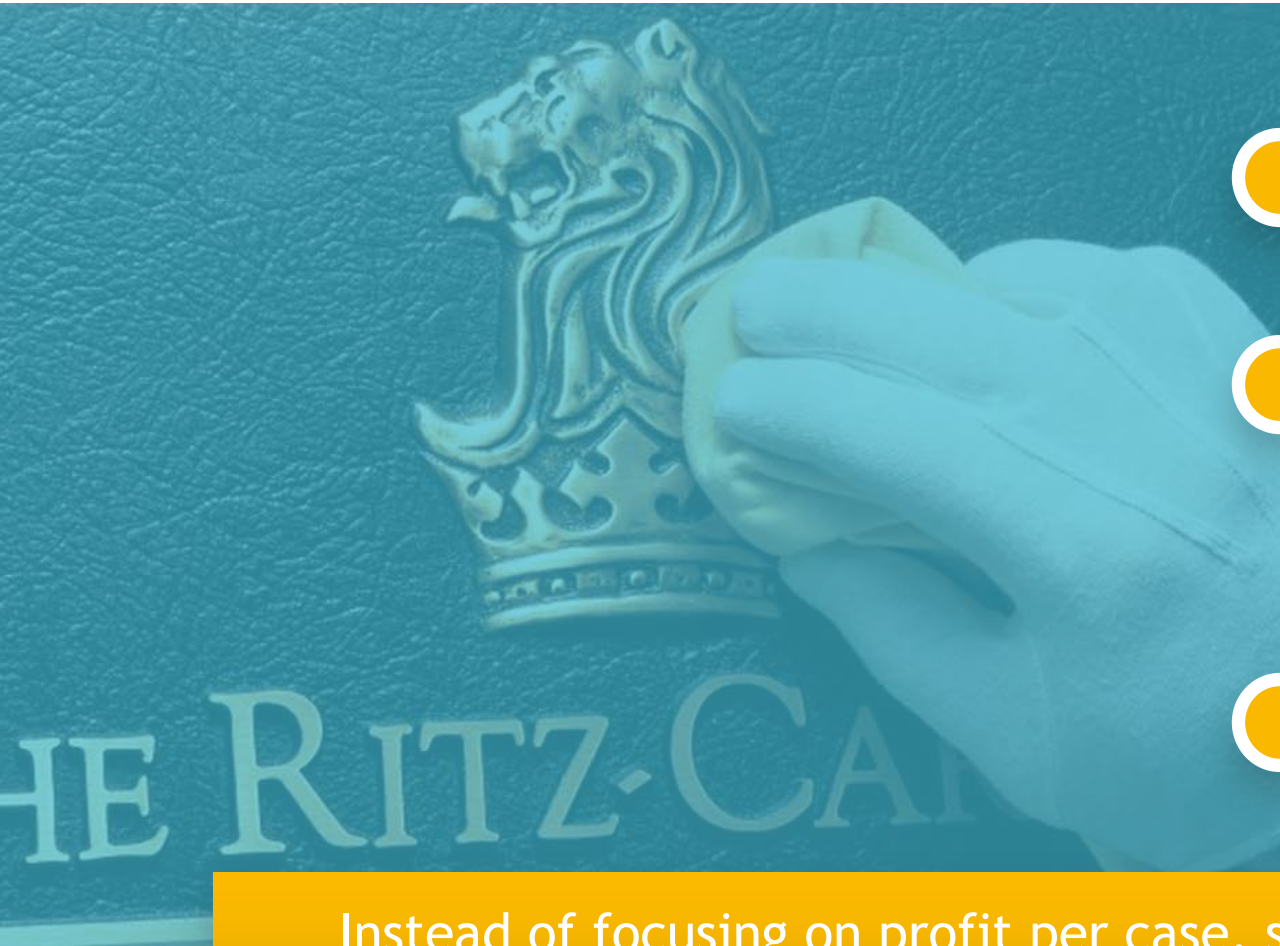
No Additional Cost

Braces → Invisalign

No Additional Cost

Experience Above All Else

The Ritz Carleton Golden Rule



The Ritz Carleton empowers their employees to spend up to \$2,000 an incident to solve their customer's issues. And this is without getting their managers permission!

Most stays at the Ritz Carleton are under
\$2,000!

The average loyal customer spends
\$250,000
at Ritz Carleton over their lifetime

Instead of focusing on profit per case, shouldn't we consider what the average family spends on their orthodontic care over their lifetime, and their friends!



Whats Our Purpose?

Experience Above All Else:
Create Raving Fans

Culture is King

The #1 thing we hear from visiting Team Members



“My Doctor Talks Too Much in
the New Patient Room”

**The Patients think
you know what
you're doing...Don't
convince them
otherwise**



Retainer Plan



6 Years Post Treatment



4 Replacements a Year
(Truain retainers only)



Easy Sell – All in
wording/presentation



95% of Patient Get The
Retainer Plan

Phase I Retainer Plan



2 Years Post Treatment



2 Replacements a Year
(Hawley and lower lingual arch)

Zoom Whitening



1 hour in office session



Present AFTER down payment is taken



Take home bleach tray/syringe of bleach



26% of Patients add this

TC Compensation



Bonus based on goals



Changes every few months



SDSs, retainers, zoom



Competitive Incentivizing



Pool Commission Between all TCs

[illegible]

Morning Huddle



DATE _____

SCHEDULING Remind staff the date for Routine and DQ appointments: _____

QUOTE Prepare a quote for the day. Use a quote that is upbeat, encouraging, funny, empowering (Pinterest or google): _____

ANNOUNCEMENTS Use FB for current announcements: Events/Bdays, ect. _____

STAFFING Any call ins, time off, personal days? _____

SPECIAL New employees, working interviews, visitors? _____

STATS Clinical Lead (CC or LA) reads stats.

IB _____

Invisalign Delivery _____

Deband _____

SOS. _____

Appliance Delivery _____

NPE _____

DRAW BOX have a team member draw from the draw box and answer fun question/fact.

‘Everything that matters needs a system, and everything matters’

OFFICE CHECKLIST

FRONT

- ☐ Coffee area clean
- ☐ No coffee stains or spills
- ☐ Cups, stir sticks, beverage napkins, creamer, and sugar available
- ☐ Scent sy ON with FRESH scent
- ☐ Lobby area tidy
- ☐ Rug vacuumed
- ☐ Front desk free of clutter
- ☐ Drawers organized
- ☐ ALL office supplies IN STOCK
- ☐ TC rooms clean and Scent sy ON



CLINIC

- ☐ Clinic Drawers are neat (items in correct space)
- ☐ Clinic Cabinets are neat (items in correct space)
- ☐ Lab is free of clutter
- ☐ Lab floor is swept
- ☐ Clinical chairs have head rest attached
- ☐ Toothbrush station trash is taken out and mirror/ sink is wiped down
- ☐ Dippin Dots area is clean/ wiped down and well stocked

KITCHEN

- ☐ All purses are hung up
- ☐ Food is put away
- ☐ Fridge has been cleaned out
- ☐ Snacks are put away and organized

BATHROOMS

- ☐ All bathrooms are clean
- ☐ Trash taken out
- ☐ Sink/ mirror wiped down

EXTERIOR

- ☐ Signage
- ☐ Windows
- ☐ Shrubs

CABINETS

- ☐ Free of knicks

OFFICE MANAGER DAILY CHECKLIST

MORNING DUTIES

- ☐ Is lobby ready for opening?
- ☐ Keurig has coffee, sugar, creamer, cups
- ☐ Scent sy on with fresh scent
- ☐ Ready for Morning Huddle (template ready)
- ☐ Walk through patient bathroom
- ☐ Assign "Admin Daily Checklist" duties (USE at EVERY office)



MIDMORNING DUTIES

- ☐ Walk through lobby
- ☐ Walk through clinic
- ☐ Greet patients
- ☐ Offer refreshments
- ☐ Sit at "check out area"
- ☐ Check that "Admin Daily Checklist" duties are done
- ☐ Sync Google calendar in Focus

BEFORE LUNCH

- ☐ Is front desk covered during 12-1 (should ALWAYS have coverage)?
- ☐ Check that "Admin Daily Checklist" duties are done
- ☐ Turn Referrals in at Dr's Desk (11:30)

AFTER LUNCH

- ☐ Sit at "check out area"
- ☐ Walk through clinic
- ☐ Make sure Clinical Coordinator is starting on time
- ☐ Patients back at 1:10?
- ☐ Check your offices collections

MIDAFTERNOON DUTIES

- ☐ Check that "Admin Daily Checklist" duties are done
- ☐ Walk through lobby (Is it busy? Offer snacks and drinks to those waiting)
- ☐ Walk through patient bathroom
- ☐ Walk through clinic
- ☐ Work on Admin Duties
- ☐ Input any time clock notes

END OF DAY

- ☐ Turn Referrals in at Dr's Desk (4:30)
- ☐ Check that "Admin Daily Checklist" closing duties are done
- ☐ All lights off, doors locked, computers turned off
- ☐ Check Dippin Dots/ Office Supplies
- ☐ Check NP Schedule (a week out) and assign TC coverage or reports
- ☐ Tidy doctors desk/ empty trash
- ☐ Receipts

CLINICAL MANAGER DAILY CHECKLIST

MORNING DUTIES

- ☐ Assign Assistants a chair
- ☐ Assign Open/ Closing Duties
- ☐ Turn on compressors, music, lights
- ☐ Fill in Morning Huddle template
- ☐ Pull deliveries for the day/ week



MIDMORNING DUTIES

- ☐ Check Clinical Daily Checklist is completed
- ☐ Assign Assistants for SDS during lunch
- ☐ All chairs have tray ready before lunch
- ☐ All charts checked out

MIDAFTERNOON DUTIES

- ☐ Check duties

END OF DAY

- ☐ Check charts for next day
- ☐ Check scan log/ scanner
- ☐ Get impressions to main office
- ☐ Closing duties done
- ☐ Final walk through
- ☐ Charts checked out
- ☐ Restock list completed
- ☐ Email to Invisalign Coordinator
- ☐ Turn off compressors, music, lights

WEEKLY

- ☐ Email Clinical Director or SOS Reports
- ☐ Email CD Type Timing Reports
- ☐ Email CD Weekly Updates on Team
- ☐ Email CD Chart Audits
- ☐ Email CD the CM Daily Checklist

Clear/Concise Job Descriptions

“Statement Of Work” For All Positions

Communicate Thoroughly And Often To
Ensure You Are On The Same Page

Bonus Behaviors You Want To See
(Bonuses Should Have A Clearly Defined
Start/End Date)

Job Duties/ Responsibilities

The Office Manager will be responsible for the following:

Responsibilities	Description
Assign Tasks to Front Desk And Call Center	Reports, emails, collections, courtesy calls, and confirmation calls are all delegable tasks. Assign one of the following tasks monthly. Inspect that the task has been completed.
Paying Bills	Pace / Perdido OM handles all orthodontic bills, which include: electric, trash, licenses, pest control, etc.
Office Maintenance	If there is an issue with plumbing, a broken chair, the x-ray machine not working, you will call and schedule the repair.
Ordering Supplies	You will keep track of the supplies according to the restock list. Items should be ordered and organized.
Referral Gift Cards	Referral gift cards are made at the home office, it is your responsibility to take them to the correct office and put in lock box.
Upset Patient or Parent	If a patient or parent is upset, pull them aside privately. Discuss the situation as calmly as possible. With any complaints, whether from a phone call, in office, or online, make sure to follow up . Intercept any difficult phone calls between patient or parent and employee. It is your responsibility to diffuse any escalated situations with a smile on your face and in your voice.
Employee Discipline	Be attentive to what is being said around you. Deter any negative conversations between employees. If an issue occurs in which the employee is violating policy, write up an incident or conversation report. Discuss the write up with the employee. If you give the employee a probationary period, follow up with them on appointed date.
Employee Reviews	At the employee's 90 day, you will give a performance evaluation. At the beginning of each year (January) each employee in your department will receive an annual performance review. It will be your responsibility to fairly evaluate their performance and give proper instruction to better their individual performance as well as how they work with others.
Payroll / Time Clock	The Pensacola / Ft. Walton OM will handle all things payroll. Each OM is responsible for correcting any timeclock mistakes. The Pensacola / Ft. Walton OM will add all PTO and sick days to excel spreadsheet.

Fishbein Orthodontics • September 24, 2018

2

fishbein
ORTHODONTICS



Office Manager

Date
September 24, 2018

Services Performed By:
Fishbein Orthodontics
4900 Marketplace Rd., Pensacola, FL 32504
850.477.1089

Welcome to the Fishbein Leadership Team. We are happy to have you as a crucial part of our growing business. As our company is changing, we recognize the need for the development of new positions. You have played an intricate role in the development of the administrative staff. You have also proven, through your hard work and dedication, that you are the right fit for this position. This position is a four-week TRIAL and training period. We are excited for you to start on this new journey! Please read through thoroughly to understand the position, your job duties, requirements, and training period.

Period of Performance

Training will start on September 24, 2018, and will continue through October 22, 2018.

Engagement Resources

Your current Office Manager will begin training you.

Job Description

An Office Manager's priority is managing the overall flow of the office. The Office Manager creates an organized environment while directing front desk staff and clinical staff members to perform their assigned job responsibilities. The Office Manager delegates tasks and inspects that those tasks have been completed. Included in the overall flow of the office, is keeping the office clean, well-stocked, and properly running to Management standards.

Fishbein Orthodontics • September 24, 2018

1

Performance Review



EMPLOYEE PERFORMANCE REVIEW



Employee Information

Name _____ Hire Date _____
Job Title _____ Today's Date _____
Department _____ Manager _____

Ratings

	Poor	Fair	Satisfactory	Good	Excellent
Job Knowledge	1	2	3	4	5
Comments _____					
Work Quality	1	2	3	4	5
Comments _____					
Attendance/Punctuality	1	2	3	4	5
Comments _____					
Communication/Listening Skills	1	2	3	4	5
Comments _____					
Dependability	1	2	3	4	5
Comments _____					

Overall Rating (average the numbers above)

Evaluation

Additional Comments

Goals

Verification of Review

By signing this form, you confirm that you have discussed this review in detail with your supervisor.
Signing this form does not necessarily indicate that you agree with this evaluation.

Employee Signature _____ Date _____

Manager Signature _____ Date _____



Brittney Alford recommends Fishbein Orthodontics.

September 2 at 1:35 PM · 🌐

We went in today for a consultation with my 11 year old son for braces and stages leading up to braces. The office is very nice and clean, with a great layout. All the staff members are friendly and professional from check in to check out. They made sure my son was comfortable and explained everything to him in terms he could understand. I had every intention of shopping around a bit before deciding on an orthodontist, but we felt so confident in the team at Fishbein that we actually decided to move forward and we were able to get started on our treatment plan with them today! My son and I are both excited to be starting this process at such a great practice.



“I had every intention of shopping around a bit before deciding on an orthodontist, but we felt so confident in the team at Fishbein that we actually decided to move forward and we were able to get started on our treatment plan with them today!”

Training Checklist



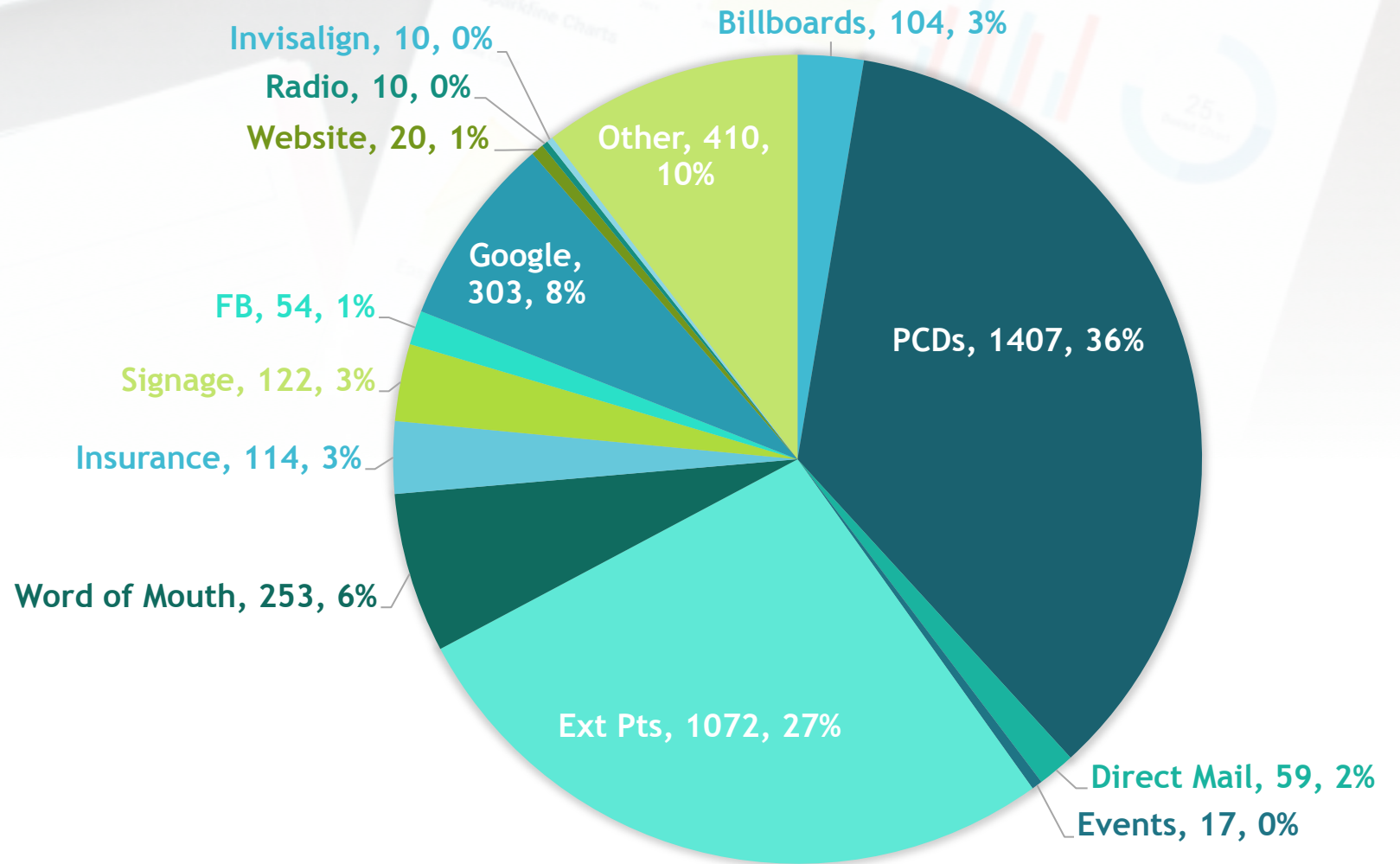
TRAINING CHECK LIST



	Day 1	Day 2	Day 3	Day 4
Week 1	Sterilization	Separators, Photos, Scanning	Impressions	PCH/ Retie
Supervisor Initials	_____	_____	_____	_____
Week 2	CAWs	ST/ khooks	EXP/ ACT	Pontics
Supervisor Initials	_____	_____	_____	_____
Week 3	Fit and Impress (Bands)	Fit and Impress (Bands)	Bonding	Bonding
Supervisor Initials	_____	_____	_____	_____
Week 4	INV/ Bonding	INV/ Bonding	Deband/ ret	Deband/ ret
Supervisor Initials	_____	_____	_____	_____

Marketing

2018 STARTS



ROI

Trackable ROI vs Brand Awareness

D:\Marketing\Desktop\2018 Budget Report

ROI REPORT JULY 2018

Category	Yearly Budget	Monthly Budget	\$pent July	\$starts	# Starts	Category Start %	\$pent per Start	# NPEs	% NPEs Started	ROI
eNox Media	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Logo Motion	\$ -	\$ -	\$ -	\$ -						
HIP	\$ -	\$ -	\$ -	\$ -						
Wahoos	\$ -	\$ -	\$ -	\$ -						
Cat Country	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Humane Society	\$ -	\$ -	\$ -	\$ -						
Billboards	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Direct Mailers	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
EDN Digital Screens	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Google	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Facebook	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
PCDs	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Partners in Education	\$ -	\$ -	\$ -	\$ -						
Referral Cards	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Dip N Dots	\$ -	\$ -	\$ -	\$ -						
Events	\$ -	\$ -	\$ -	\$ -		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Sponsorships	\$ -	\$ -	\$ -	\$ -						
In-house Contests	\$ -	\$ -	\$ -	\$ -						
Other Ads	\$ -	\$ -	\$ -	\$ -						
OrthoChats	\$ -	\$ -	\$ -	\$ -						
Marketing SUV	\$ -	\$ -	\$ -	\$ -						
Party Planning	\$ -	\$ -	\$ -	\$ -						
TOTALS	\$ -	\$ -	\$ -	\$ -	0		#DIV/0!	0	#DIV/0!	#DIV/0!
OVERALL		\$ -	\$ -	\$ -	0		#DIV/0!	0	0%	0%

D:\Marketing\Desktop\2018 Budget Report

ROI REPORT JULY 2018

Top Dental Referrals	# Starts	\$starts	# NPEs
	17	\$ -	45
	9	\$ -	6
	7	\$ -	16
	6	\$ -	9
	6	\$ -	3
	5	\$ -	0
	4	\$ -	7
	5	\$ -	18



Swag & Materials

Logo on EVERYTHING

What is Trending, Unique, or Classic?

Branded Office Supplies

Available in Every Office and at Events

Aliza@fishortho.com

Events

- FishOrtho 5k
- Basketball Tournament
- Feeding the Homeless
- Hunger Heroes
- Habitat for Humanity
- Girl Scout Parties
- Pace Center for Girls
- ECPS Premier Sponsor



Videos



About



New Office or Dr



Campaign

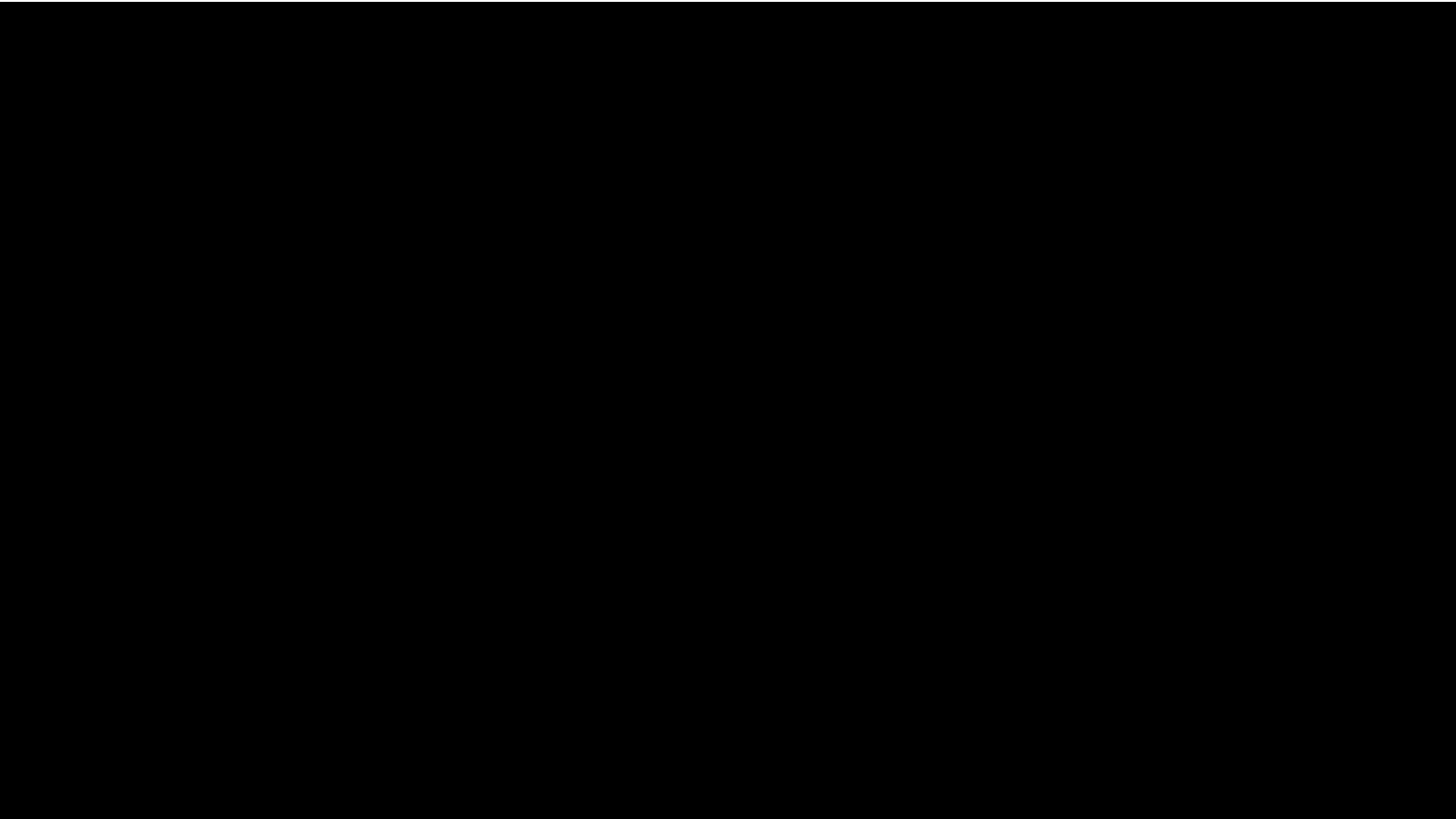


Lifestyle



fishbein

ORTHODONTICS



Billboards



Blue Wahoo's Baseball

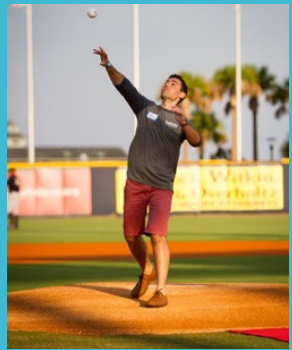
- Official Smile Provider
- Smile Suite
- Party Deck
- First Pitches
- Table Dates
- Season Ticket
- SmileCam
- Employee Discounts



You're Invited

to a special Pensacola Blue Wahoos experience at our FishOrtho Smile Suite table! Enjoy the game VIP style with a stunning view and delicious food on the Hancock Bank Club balcony.

See back for Details





Staff Morale

Contests

- Prizes Like a Shopping Spree

Team Building Meetings (Quarterly)

- Family Fun Day
- Painting with a Twist
- Sam's Fun City
- Beach Brawl
- Sky Zone
- Christmas Parties
- Cruise
- Annual Retreat



Appreciation

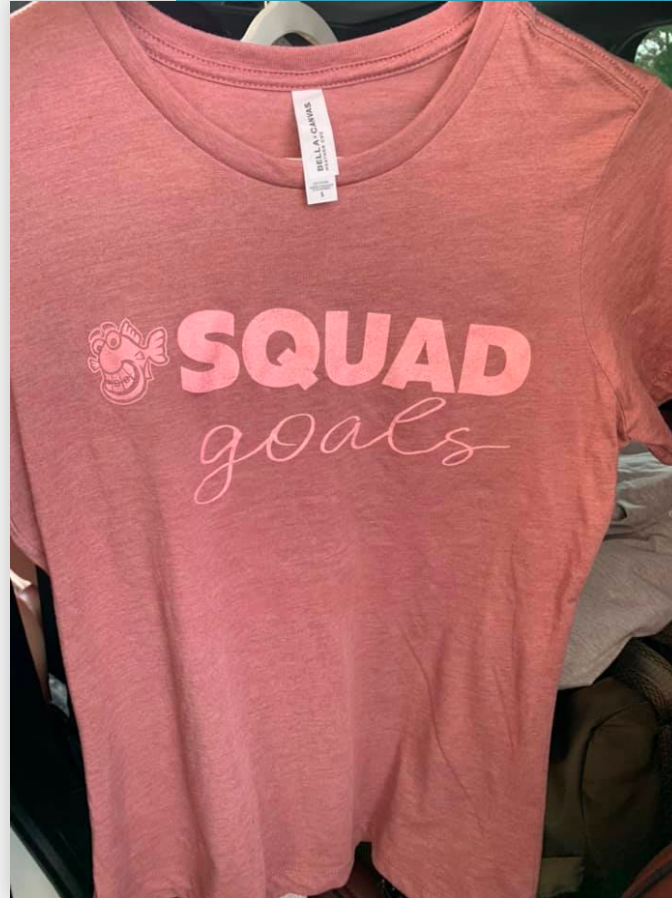
Snacks And Drinks In Every Office

Monthly Full Team Lunches



Core Values

family
integrity
Service
humility



Keeping Morale Up Quarterly Meetings



Keeping Morale Up Quarterly Meetings



Keeping Morale Up Quarterly Meetings



Keeping Morale Up Quarterly Meetings



Keeping Morale Up







“If you look after
your staff, they'll
look after your
customers.
It's that simple.”

- Sir Richard Branson -

**We've had 300+ Orthodontists/Team
Members visit our offices**

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*An In-Office Course focused on Orthodontic
Practice Management & Marketing*

► Register

March 13-14, 2020

September 11-12, 2020

Fishbeinfundamentals.com

Fishbein Fundamentals



Sep 11-12 2020

fishbein FUNDAMENTALS



One-on-One

Team Member Training



Spend a full day of individualized, hands-on training with one of our experienced team leaders who have been integral to the success of our practice. There are four tracks specifically designed to meet the needs of all members on your practice's team.



Amanda@fishortho.com

fishbein FOUNDATION

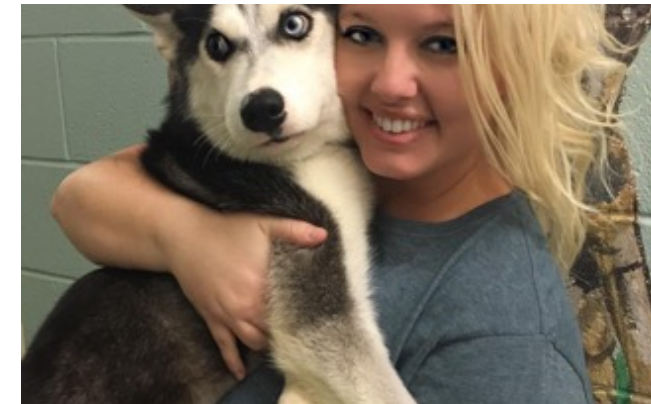
EmBraces
An Initiative of the fishbein FOUNDATION

\$1,000,000 IN
smiles

Fishbeinfoundation.com


Humane Society

- Kennel Sponsorship
- Adoption Events
- Paws on Palafox
- Barktoberfest



EmBraces


EmBraces
An Initiative of the Fishbein Foundation



Bullying is a nationwide epidemic
that over **3.2 million students** report being victims of each year.

This means that almost every kid in school knows someone who has been bullied or is even the bully themselves. Dr. Fishbein and his team at Fishbein Orthodontics want you to help everyone see why it's important to embrace those around you.

Ending bullying starts with you! Visit the EmBraces website with your parents to learn more about how sharing your experience with bullying and what you'd like to do to help stop it can help you **win FREE braces**.



850-477-1089
Visit: FishOrtho.com/EmBraces
Fishbein Orthodontics is licensed and insured

fishbein
ORTHODONTICS

Congratulations to Our **EmBraces** Winners



Isaiah **Franiya** **Anna**

fishbein FOUNDATION

EmBraces

Spring 2018 Winners



Kaitlyn



Kyra



Rilee



WEAR ABC 3 News, Pensacola

Yesterday at 1:00 PM • 🌐



A local orthodontist has launched an anti-bullying campaign - and will provide free orthodontic care for children who have been bullied.



WEARTV.COM

Local orthodontist fights bullying one smile at a time

One local Orthodontist is fighting bullying in our community, one smile a...

👍❤️😮 846

74 Comments • 236 Shares



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\$1,000,000 IN
Smiles



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