



# 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



# **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** 







(2013)

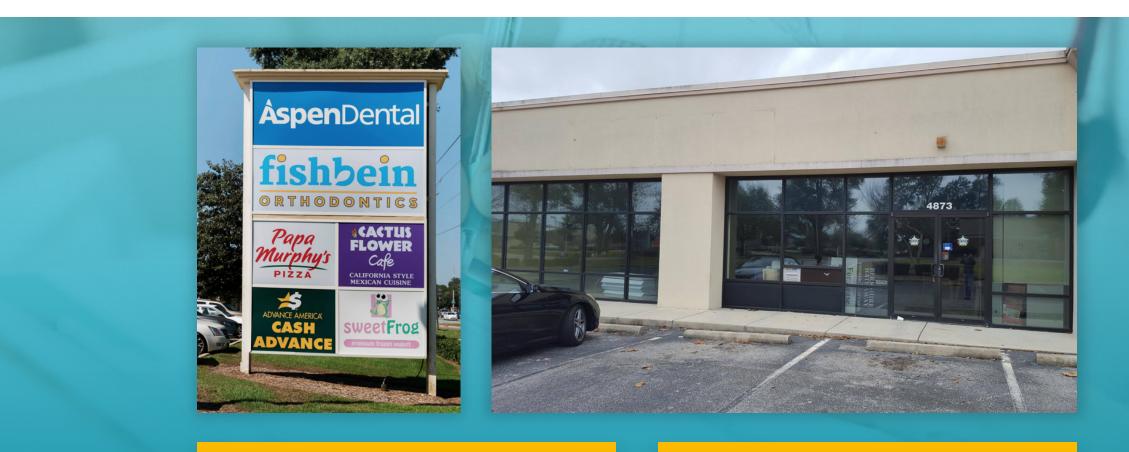
6 Team Members

2 Offices





# Our Story (2016)



Continued to Grow

Opened 3rd office (Pace, FL)

# Our Story (2017)



Opened 4th office (Crestview, FL)

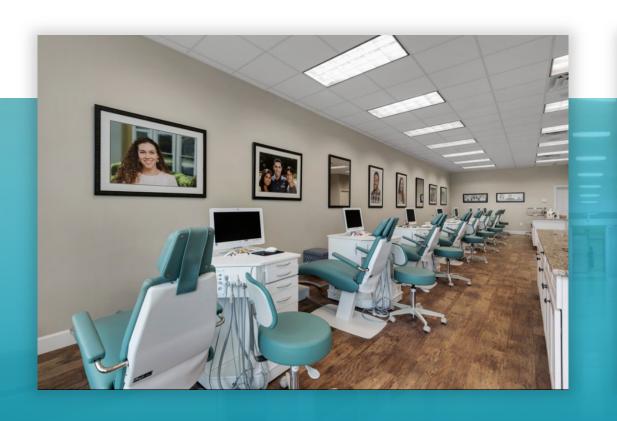


**Expanded and Remodeled Navarre Office** 



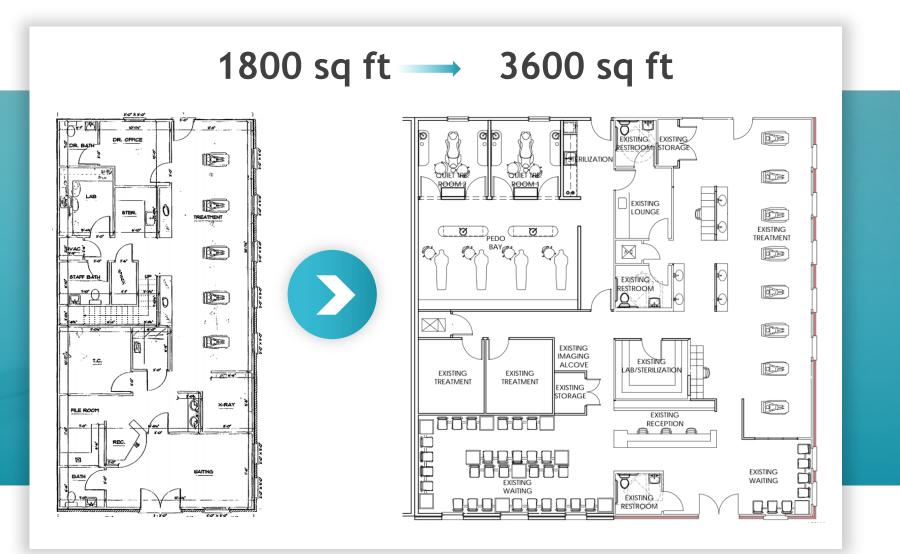
Dr. Sarah Howle joined our team



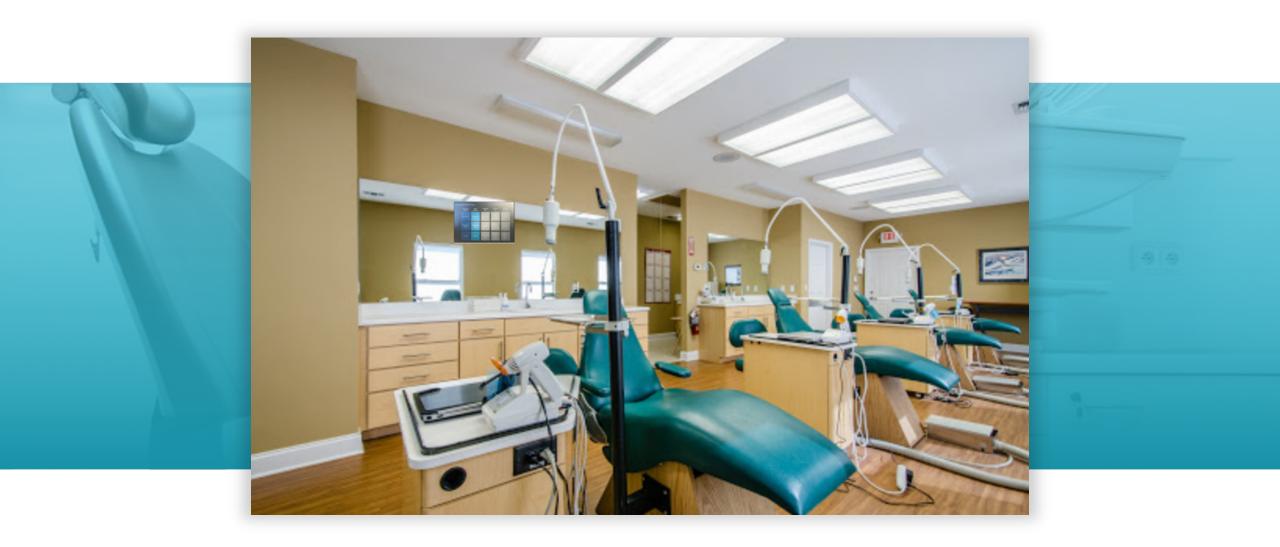




## **Navarre Office**

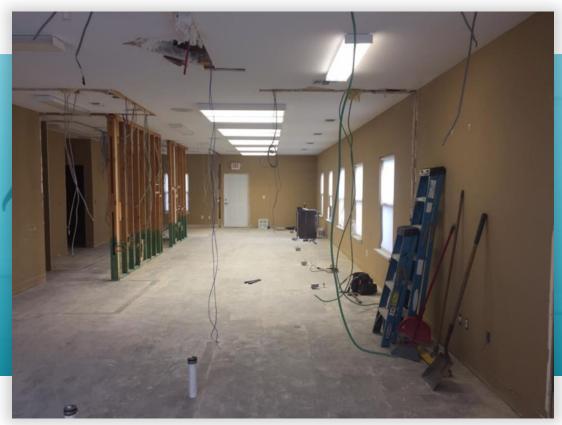


## Navarre Office - Before

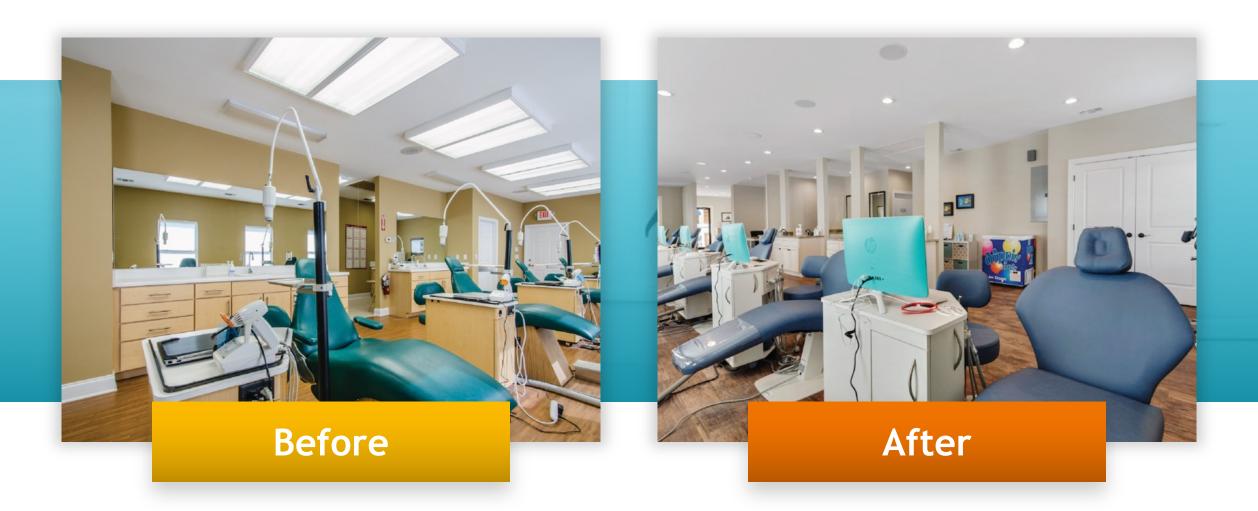


# Navarre Office - Progress

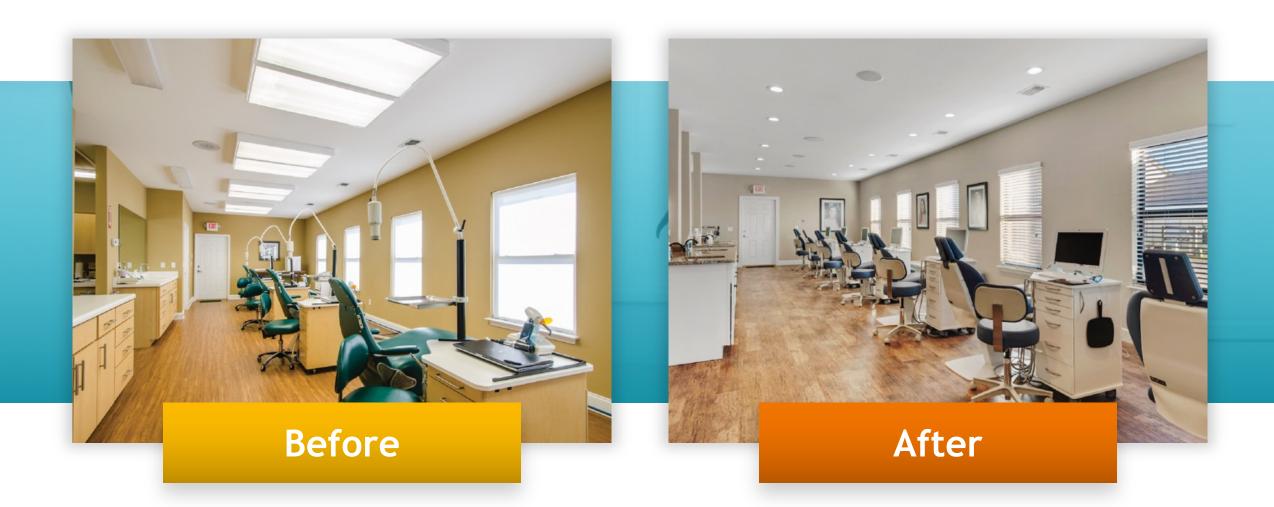




# **Navarre Office**



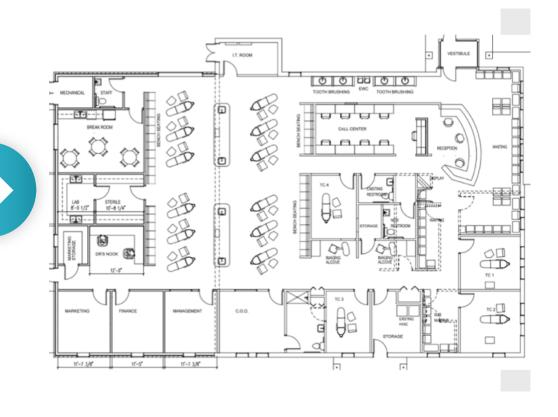
## **Navarre Office**

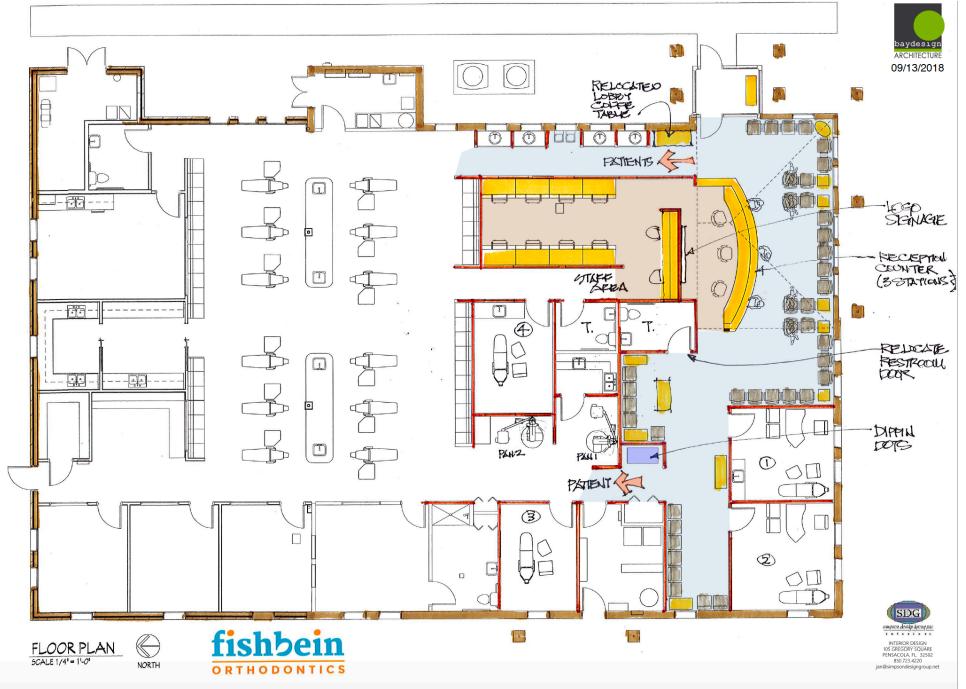




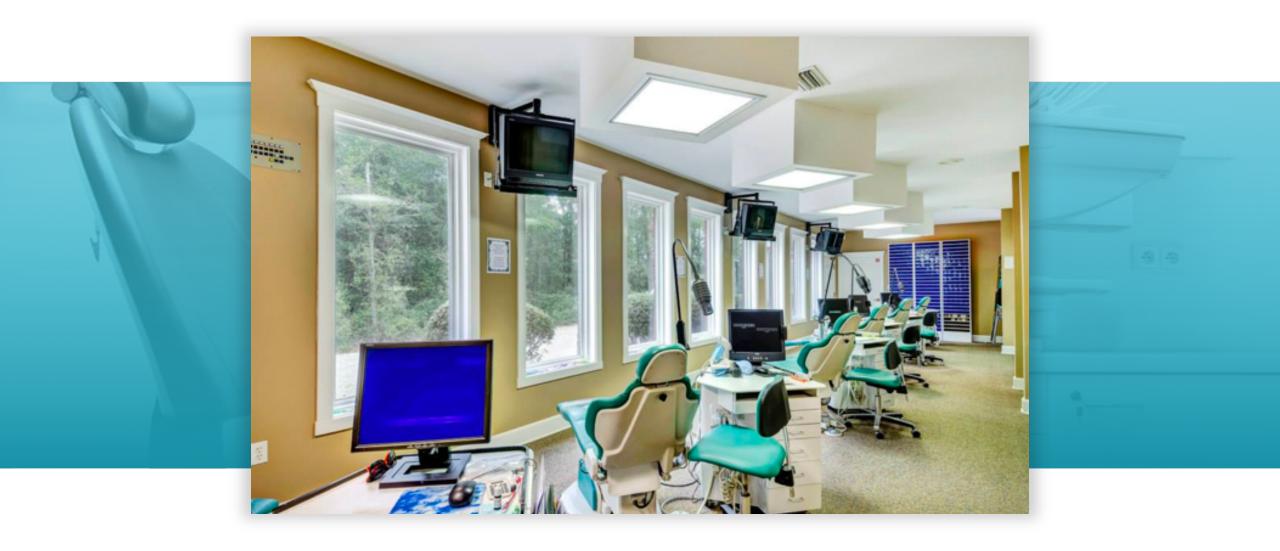
### 4400 sq ft ---- 6800 sq ft







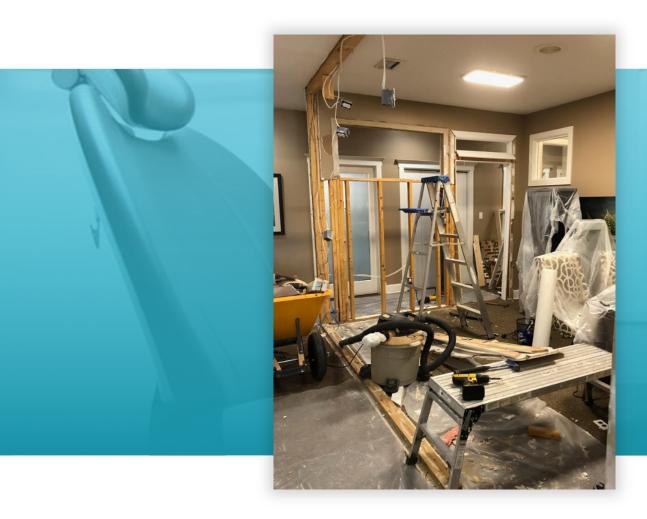
# Pensacola Remodel - Before



# Pensacola Remodel - Before

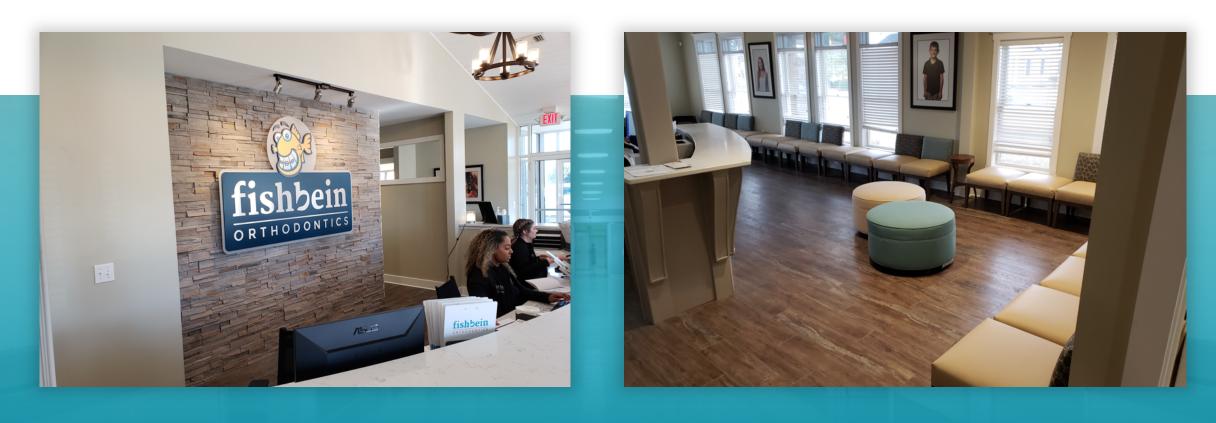


# Pensacola Remodel - Progress

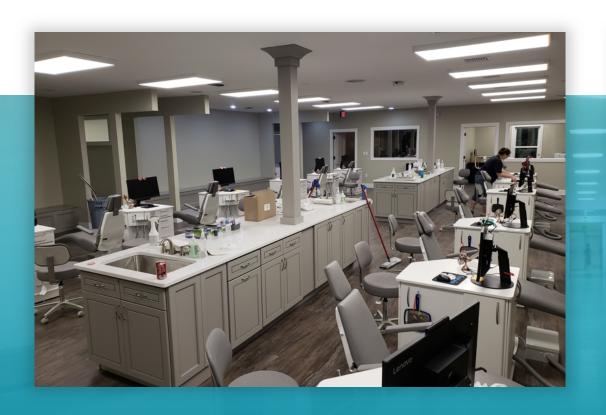


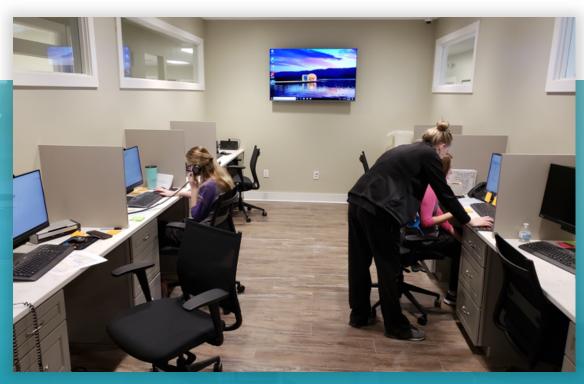


# Pensacola Remodel - After

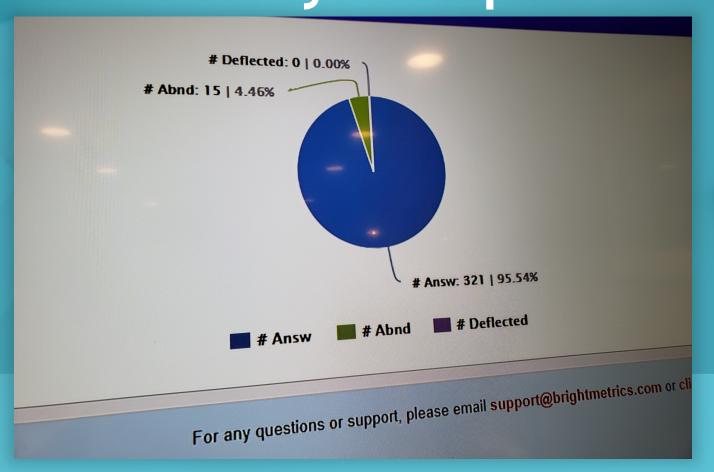


# Pensacola Remodel - After





# 'Team members respect what you inspect, not what you expect'







## 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 Mintues)
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://
<ul><li>Date of last examination and x-rays:/</li><li>Date of last hygiene visit://</li></ul>	<i>J</i>
If any periodontal or restorative treatment is yet to be details:	, ,,
Please contact me about this patient before p	proceeding with treatment.
Orthodontic appointment scheduled://_	
Thank you for taking the time to review, complete, a look forward to working with you to provide optimal patients.	
Doctor or Supervisor's Name:	
Doctor or Supervisor's Signature:	Date://

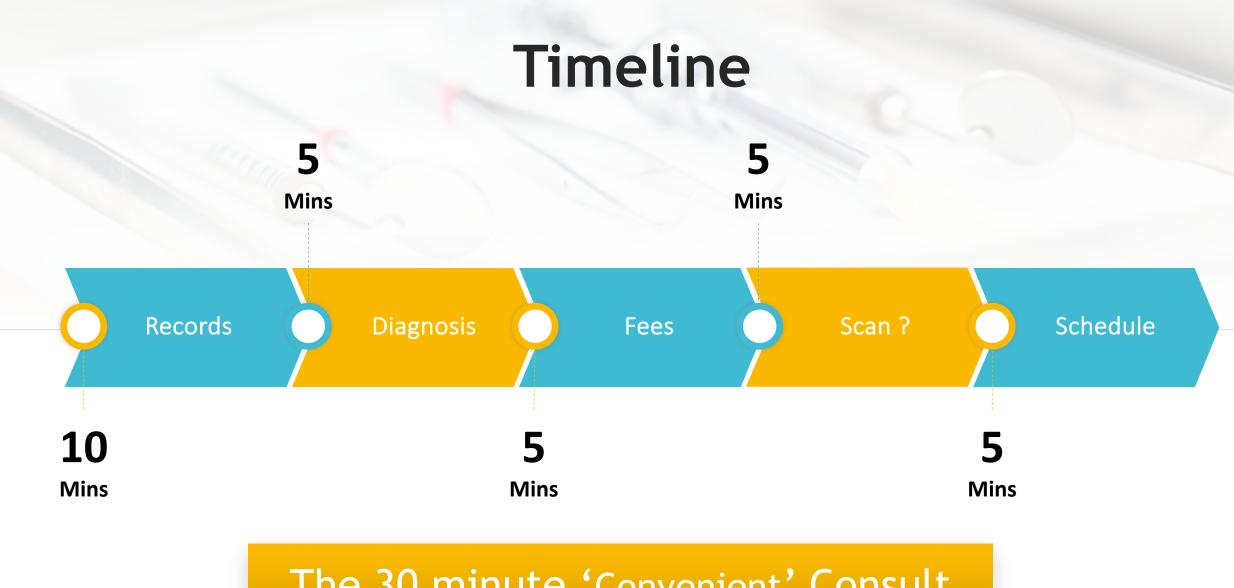
Please fax the completed form to 850-479-3548 or email to <a href="info@fishortho.com">info@fishortho.com</a> as soon as possible. Thank you!



#### **CLEARANCE APPROVAL FORM**

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

Dr	is recommending that	clearan	
(Orthodontist)	(Type of C	Clearance)	
be completed before	's next appointm	ent, which is schedu	
	(Patient)		
for/			
We are sending this along with the referral so that we can seek your approval to			
started with orthodontic t	reatment. Please sign and return o	nce our mutual	
patient's clearance has be	en approved.		
Doctor or Supervisor's Na	me:		
Doctor or Supervisor's Sig	nature:		



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 Vs. Braces (2013)



Which one do you think most patients chose?

<5% Invisalign

# Invisalign Vs. Braces (2019)

Total Cost

Down Payment

Monthly Payment

**Doctors Recommendation** 

InvisalignBracesSameSameSameSameSameSame

Which one do you think most patients chose?

~30-40% Invisalign

# Whoever Makes It Easiest Wins

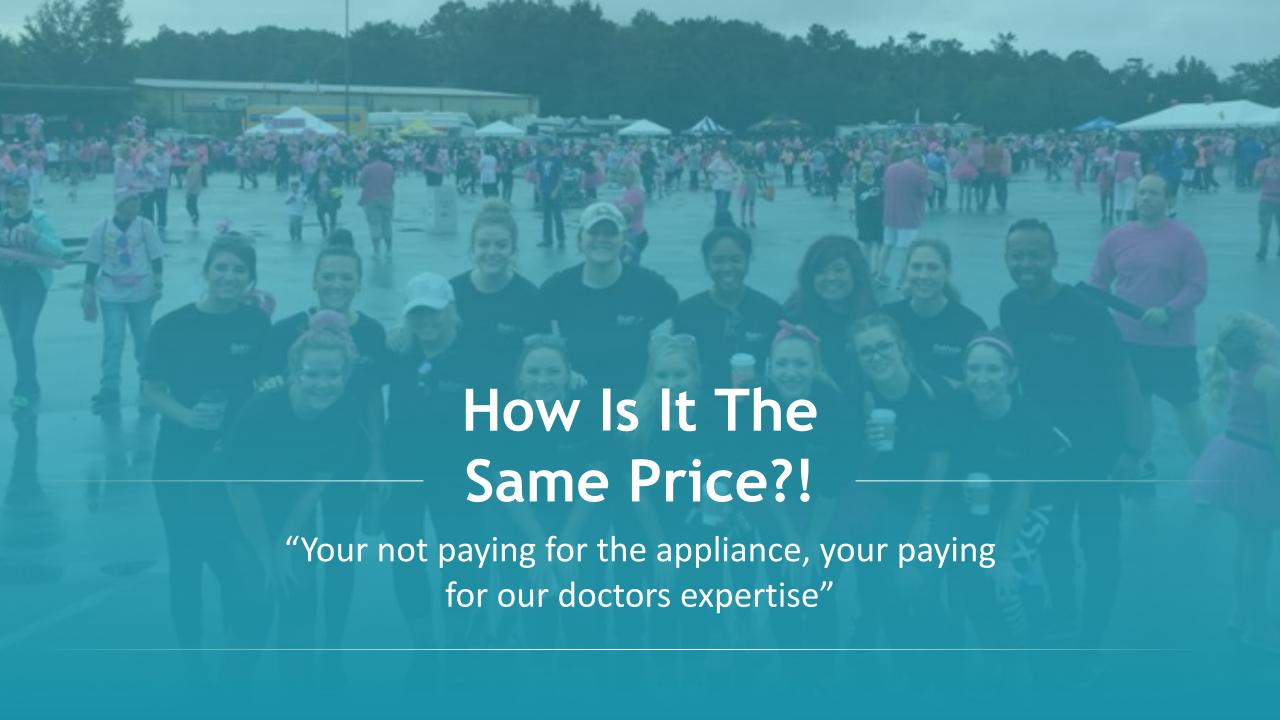
Remove Obstacles to Treatment

**Braces Down Payment** 

Same

Invisalign Down Payment

Same



### 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!

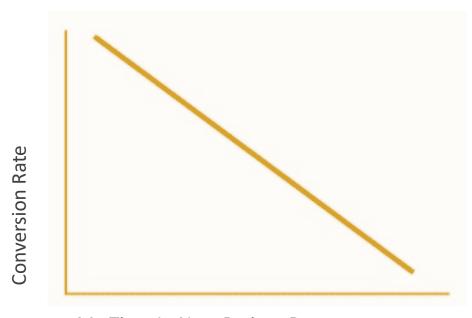


Experience Above All Else:
Create Raving Fans

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



My Time In New Patient Room

### Retainer Plan

- 6 Years Post Treatment
- 4 Replacements a Year (Trutain 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)



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

	Chair 1	Chair 2	Chair 3	Chair 4	Chair 5	Chair 6	Chair 7	Chair 8	Chair 9	Chair 10	Chair 11	Chair 12
8 <sup>AM</sup> _05	Emily Messer	Dionte Sims (INV-CK)	Addison Peltier	Kendall Poston	Kilian Foree (Short)	Landis Wood (Bond)	Dominica Estes (Short)	Desiree Jones (Short)	Peggy Kirby (INV- REF	Isiah Davis (Short)	Haile Thomas	
10	(Bond) NV: DB	INV COR	(Short)	(Bond)	CAW's neos,	NV: DB UL3			DEL)	chk els	(NP-15)	
15	UR5, repo	A vianna Bethea		F&I	eval for full PC	& CAWs 16 NT.					Laleshia	
20	UL6.	John Evans	Destiny		Brooklyn		Patrick Rolin	Mckenzie		Blade	Owens (NP-15)	
25		(Bond)	Holland (Short)		Casey (Appl Del)		(Short)	Fuqua (Short)		Bryant (Short)	(147-15)	
30	Malik Lee (Bond)	NV: DB L7s.	Chk CLII	Jennifer		Garrett	dq Retie	(=111.9)	Madikay Faal (INV-	NV: Eval to	Shanda	
35 40			Rescheduled	Edge	Rescheduled Per Patient	Wiggin (Bond)	Rescheduled	-1	REF DEL)	CLAW	Wiggings (NP-M)	Destiny Jenkins
45	Rem tongue crib. IMP for Hawley with		Samantha Hennessy	Chase Johnson	Rescheduled Per Patient	DB Le's	Chimiah Powell	Tkara Mullins		Sonya Ly (Short)	Lajarvis	(NP-M)
50	tongue crib	Raimond	(IB-1) DB U/L	(Short)	Jade		(Bond) Eval to repo	(INV- DEL) Del Inv			Hunter (NP-M)	
55		Fleming (Bond)	metal		Johnson (INV- DEL)		LL5	Rescheduled Per Patient			((44-14)	
9_00	Kelsey Kling (Short)	DB PRN	for RPE and	Eloise Doyle (Bond)	INV Del	Hayley Curl (Bond)		Per Patient	Nazaria White (IB)	Autumn	Adrionna Chatman	Note
05	(Short)	Rescheduled Per Patient	schwartz Rescheduled	NV:DB UL2,Eval to		(Bond)	Heresk	Addison	DB U/L	Dornstadter	(NP-15)	Keri Anne Duff-
15			Per Patient	UL2,Eval to add pch			Hannah Tilley (Short)	Addison Ward (Short)	metal braces	Jeremy Vass	sister of Alexis	
20	Diana Bui	Quadarien		U1-1 mesial-mesia	Kendal		Dawn			Demitrius	Chavarria (NP-15)	
25	(Short)	McGee (Short)		1	Nobles (IB)		Stuckey (INV- REF			Christy (Long)	((11-15)	
30	nv: retie, change pc's			April Brown (INV- REF		Ty-Keirra Stokes	DEL)	Chloe McKeen			Lashonda Perry	
35 40	Emani	Alexander	Jazel	DEL)						and Marchelaton	(NP-15)	
45	Nobles (IB)	Dorn (Short)	Shoemo			Torya Wilson (IB)		Sheldon Crawford		1 1 11 11	Joshua Scott	
50		Start W els, chk	(Short) NV:eval				Tabais	Fathi			(NP-15)	
55		alignment	CAW			and the second	Walker	Abuokab (Bond)		2.1.11.111.111.111		
10_00		Linda Owen (INV-SC)	Makayla Dawkins	Jordan Cassaberry		10.00.00.00	Monae Williams (IB)	nv: rem sep	Rita Maher (INV- REF		Natara Brooks	Jasmine Sanchez-Har
05 10		Scan for	(Short)	(Bond)			DB U/L	, F & I for RPE	ĎEL)		(NP-M)	ris (Appl Del)
15		INV retainers	Let Nancy know if any	Rescheduled			metal braces	NV2: rem sep, del RPE	NV: Del INV.		Shannyn	NV: Del U/L
20			Christian	Per Patient	Katalyna			Zahra Durant		Courtney	Mikell (NP-15)	
25			Endres (Long) Endres		Harold (INV- REF DEL) Harold (INV-		l	(IB)		Toole (Bond)	V,	
			(Long)		REF DEL)			(IR)		I oole (Bond)		
30		Anna Olaya (INV-SC)	Deband or ref scan	Hannah Bolton	del ref				Michael McCoy		Lamarcus Woodard	
40	Tyshawna	David ded		(Deband)		Luke			Katelynn		(NP-M)	
45	Harris (Short)	Rescheduled Per Patient	1 1 1 1 1	Deband LR5,6 & 7		Shepherd			Foxworth (Appl Del)		brother of Steve	
50	nv: chk l7's,		The state of the s	AND UL4,5 & 6. Imp for	Fantasia	(Short)			RPE READY	Courtney	Woodard (NP-M)	
55	CLAW			new TruTs. Write ref to	Wiggins				FOR DEL. / PR	Ivey (SOS)	brother of	NP-15
11_00	Dominique Jones (Short)	Justin Peters (Short)	j., 1, 1,	Dr. Washburn to	Brittany Jenkins	Stephanie Mallov	Sasha Rodriguez			Va'trelle Williams (IB)	NP-15	
05 10	Retie			restore LR7.	(Short)	(INV-REF DEL)	(Long)		Mydinda	, , ,		
15			0.000	*Per Dr. Ben*	CAW's, retie.	nv: inv ref	NV: BAND 6s & LR7		Mylinda Johnson (INV-SC)		Tamaria	
20	Joseph	Tiffany	Colleen	Rescheduled Per Patient	Terry Posey	del		Shayleigh Lopez-Beyer	(ZIVV-SC)		Cottrell (NP-15)	
25	Reynoso	Calhoun (Short)	Doherty (INV- REF		(Bond)		1 1 1 1 1 1	(Bond)				
30	Shaina Contigiani	chk spring	DEL) INV Ref Del	Allyson Cain (INV- REF		Teslah Bastian		F/I for RPE and			NP-15	
40	(INV-SC)	aligner, CM Khiyel	1111 KEI DEI	ĎEL)		(INV- DEL)		Schwartz	Monica			
45	Scan for REF #1	Walker (Short)				NV: inv del	La company		Morin (Short)			
50		(2)			Fredrick Lett			Michael		alla anamania		
55	LCH	LCU	LCH	LCH	(Short)	LCH	LCH	Patterson	LCU	LCH	LCH	
12 PM 05	LCH	LCH	LCH	LCH	LCH	LCH	LCH	LCH	LCH	LCH	LCH	
10												
15												
20												

30						1		1				
35												
40												
45												
50												
55												
1 00	V	Sydney	Davis									
05	Voyanna Paden	Gable (SOS)	Devon Wilson									
10	Maya	Ahren	Renee Pond	Jessica	Kelsey Hoag	Jay	Dejanee	Alexis Briggs	Lisa Grimm	Justin Travis	Amanda	
15	Maturino	Widman	(Short)	Seeley	(Bond)	Burnham	Watson	(Bond)	(Short)	(Short)	Alvarado	
	(Deband)	(Short)		(Long)		(Appl Del)	(Short)				(NP-15)	
20				NV: Deband or ref scan.		Del Nance-REA						
25				Rescheduled		DY TO DEL	Rescheduled				Kanisha Black	
_30		Conner McClammy	Alishia Marcelle	Per Patient Rescheduled			Jasmine Gilchrist (IB)		Haley Yoakum	Cedric Ennis (INV- DEL)	(NP-15)	Antony Thompkins
35		(Short)	(Short)	Per Patient			DB U/L		(Short)	(IIII DEL)		(NP-15)
40					Michael Hennessy	Davis Goodwin	metal braces	Lauren		Rescheduled	Mikayla Scott	
45			Rescheduled		(INV- RÉF	(INV-SC)	Rescheduled Per Patient	McManus		Per Patient	(NP-15)	
50		Deondre	Matthew		ĎEL)		Rescheduled	Alisha Millar	Matthew			
55		Weathers (SOS)	Becker (IB)		INV Ref Del	Rescheduled Per Patient	Per Patient	(IB)	Boone (Short)		Isabella	
2 00						Per Patient		remove attachments	, ,	Nickayla	Johnson (NP-15)	
05			Company of the Company					and switch		Cook (Bond)	( <b></b> )	
10	Tosheiba			Daelyn	Hannah	Kaden Macht		to braces-kb Rescheduled	Taliyah	nv: RDB LL4, LL6,	Christopher	
15	McBride (Short)			Harrison (Deband)	Montgomery (Short)	(Short)		Per Patient	Shaw (IB)	U5'S,	Sparks (NP-15)	
20	(Short)			no TT's	(Short)				DB U/L metal braces	CAW'S, pc	(147-15)	
25				(unless pt					*Chk which		Keith Griffin	
30	T∨ekeirra	Demartez		wants to pay \$400.00	Johanna	Tichina	Short		insurance they have	Amber	(NP-15)	
35	Collins	Slaughter		up front).	Kraemer	Lewis (Short)		1000	before*	Vaughan		
40	(Short)	(Short)		Have pt sign	(Long)	NV:Final chk			Rescheduled Per Patient	(IB)	Dajaria	
45	NV1: Retie	NV1: DQ Retie		early release formbls		NV2:Deband			Per Pauent		Roberts	
50	Logan Seas	Daniel	Olivia			De'erika	Short	Alexis			(NP-M) sister of	
55	(Short)	Ranson	Cutshaw			Page (Long)	5	Strength	the second second		NP-15	
	NV: Quick	(Short)	(Short)			NV: DB L6-6		(Short)			Samuele	
3_00	Post Surg Check.	nv: retie, CAW'S to				metal brackets		NV: eval to CAWs		1 1 11 11 11	Smith (OBR	
10		Jackson	Contacin	Heather		Ck if pt had	David	Christian	A sieu scara		)	
15	Gage Huff (Short)	Jackson Mabry	Cortasia Weaver	Heather Foster		LL7 EXT due to decay.	Derrick Barge (Bond)	Christian Jacobs	Arieyanna Kirkland (IB)			211
		(Long)	(Short)	(Short)	6 4 HR H H T T T T T T	WO WO	NV: DB UL5	(Short)	DB U/L			Jihad Satterwhite
20							Rescheduled		metal braces	and the second of the		(NP-M)
25							Per Patient Per Patient				Dinesh	
30	Claire !!		Alasta	Charle	Kalas T. J.		Rescheduled	Lands		Culm	Dinesh Sheth	
30	Claire Han (Short)		Alexis Benson	Charlie Benson (Ret)	Keke Taylor (Short)		Per Patient	Landon Demedeiros		Suleymaan Ahmed	(NP-15)	
	<u> </u>		(Bond)				0.1	(Long)		(Short)		
40	Ryan Pierson		F&I for RPE	Jimmy Names			Rebecca Newsome	nv: remove RPE, DB		NV 1: Retie	Brandey Mitchem	
45				Nguyen			(Bond)	lower braces		& sep for	(NP-M)	
50	Kateri Salamida			Caitlin Wickham	Rhonda Frasure	Benjamin Weisser	NV: repo			Temyrrah Simmons		
55	(Short)	Parameters		(Short)	(Short)	(Short)	LR5	1		(Short)	Imagen Mccray	
4_00	CAW"s		Mary Jayne Hambright	nv: retie,						NV: retie	(NP-15)	
05	neos, eval		(INV-REF	CLAW, start		Rescheduled				KM		
10	Ava Bryson	Ava Mabry	DEL)	Jacob White	Anthony	Isabelle	Ethan			Lily Haas		
15	(Short)	(Short)		(INV-REF DEL)	Chambers (Short)	Holck (Short)	Maupin (Short)			(SOS)		
20	Start CL2 els	Rescheduled			, ,		, ,		Evan	Marlee		
25		Per Patient		Rescheduled					Sylvester	Middleton		
30												
'												

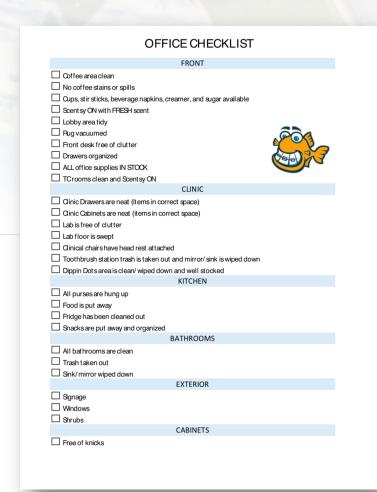


DATE									
SCHEDULING Remind staff the date for Routine and DQ appointments:									
ANNOUNCEMENTS Use FB 1	or current announcements: Events/Bdau	s, ect							
ANNOUNCEMENTS Use FB for current announcements: Events/Bdays, ect									
<b>STAFFING</b> Any call ins, time	off, personal days?								
	orking 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 MANAGED DAILY OUTCOM TOT



OFFICE MANAGER DAILY CHE	OI (LIO)
MORNING DUTIES	
Walk through lobby     Walk through clinic     Greet patients     Offer refreshments     St 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	
St at "check out area"     Walk through clinic     Make sure Qinical 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 waitin     □ Walk through patient bathroom     □ Walk through clinic     □ Work on Admin Duties     □ Input any time dock notes	g)
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 TCcoverage or reports  Tidy doctors desk/empty trash  Receipts	

CLINICAL MAN	AGER DAILY	CHECKLIST	
MO	RNING DUTIES		
MIDM	ORNING DUTIES		
Check Clinical Daily Checklist is comp     Assign Assistants for SDS during lunc     All chairs have tray ready before lunc     All chairs checked out	h		
MIDAF <sup>-</sup>	TERNOON 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 SQSReports ☐ 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 secalated 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, white up an incident or conversation report. Discuss the write up with the employee. If you give the employee 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





#### 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! Pleaser ead 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 property running to Management standards.

Firhhain Orthodontics - Santambar 24, 2018

# Performance Review

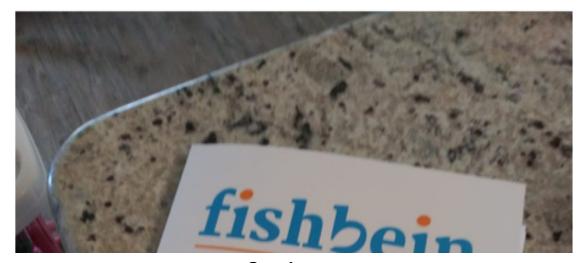
#### **EMPLOYEE PERFORMANCE REVIEW**



Employee Inform	nation					
Name			Hire Date			
ob Title			Today's Date			
Department			Manager			
Ratings						
		Poor	Fair	Satisfactory	Good	Excellent
lob Knowledge		1	2	3	4	5
Comments						
Work Quality		1	2	3	4	5
Comments						
Attendance/Punctu Comments	ality	1	2	3	4	5
Communication/List	tening Skills	1	2	3	4	5
Comments						
Dependability		1	2	3	4	5
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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 a 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 a 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

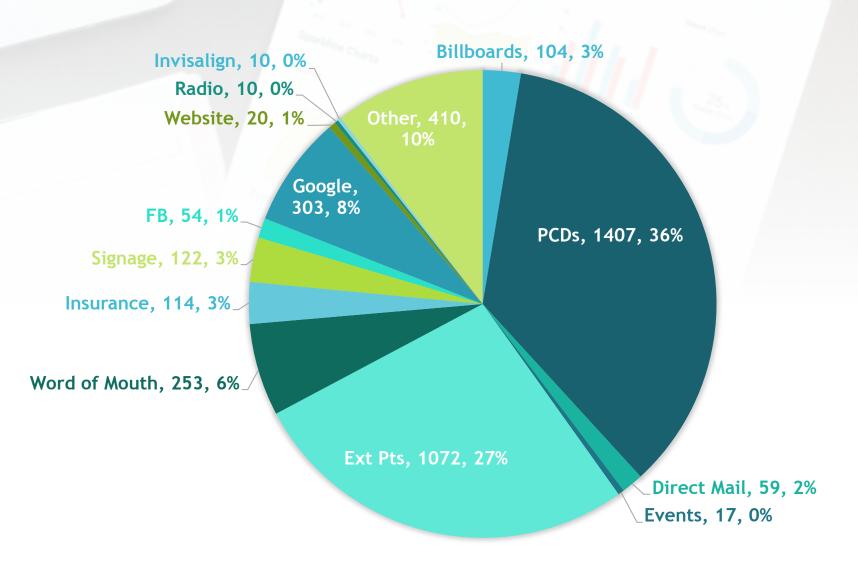
### TRAINING CHECK LIST

fishbein

nsnoem				
ORTHODONTICS	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				



**2018 STARTS** 



# **Budget Report**

#### 2018 BUDGET REPORT

Category	Details	Yearl Budge	-	Mon Bud	thly get	\$pen Jan	\$pent \$pent				\$pent April	
eNox Media	Website and campaigns	\$	£ .	\$			- 42	70				
Logo Motion	All printed materials	5	51	\$	2			S	- 8			
HIP	Photos and video	5	58	5								
Wahoos	Smile suite, party deck, OSP	\$	*:	\$				(C				
Cat Country	Radio commercials	5	20	5	-			70				
Humane Society	Donations	5	24	\$	2			S	- 3			
Billboards	Print and Digital all locations	5	55	\$								
Direct Mailers	All locations, 1 area per quarter	\$	÷	\$				65				
EDN Digital Screens	25 screens	\$	22	\$	-			70				
Google	Ranking and ads	5	51	\$	2			S	- 8			
Facebook	Contest prizes and ads	5	58	5								
PCDs	Deliveries, Contest prizes, Xmas	\$	-	\$				(C				
Partners in Education	Donations and Student of the Month	5	20	5	-			70				
Referral Cards	60 monthly avg.	\$	28	\$	2			81				
Dip N Dots	Ice cream and cups, Nav and Poola	5	55	\$								
Events	Rentals, donations, etc.	5	-0.00	5				65				
Sponsorships	Teams, groups, etc.	\$	e; ]	\$	-			70				
In-house Contests	In house contest prizes (not FB)	\$	51	\$	2			St.	- 8			
Other Ads	InWeekly, PNJ, other	\$	55	5								
OrthoChats	Website chatting	\$	-	\$				66				
Marketing SUV	Wrapped SUV	5	9: 1	\$	-			20				
Party Planning	New locations, Hygiene Night	\$	D	\$	127			S.	- 3			
TOTALS		\$	=3 1	\$		\$	-	\$ -	\$	le.	\$	
TOTALS		\$	- 1	\$	-	\$	-	\$ -	\$	íÆ.	\$	
	TOTAL YEAR BUDGET	\$	-									
	AVAILABLE	\$	20									

#### 2018 BUDGET REPORT

May June July August Sept O	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-
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# ROI Trackable ROI vs Brand Awareness

#### D:\Marketing\Desktop\2018 Budget Report ROI REPORT JULY 2018

Category	378-303	arly Iget	333,400	nthly Iget	200	ent uly	3	\$tarts	# Starts	Category Start %	\$pent per Start	# NPEs	% NPEs Started	ROI
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Logo Motion	\$	्	\$	ু	\$	9	8							
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Wahoos	\$	18	\$	3	\$	- 81								X.
Cat Country	\$	-	\$	2	\$	-	\$			#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
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PCDs	\$	-	\$		\$	-	\$	-		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
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Dip N Dots	\$	87.	\$		\$	75)	9							
Events	\$	-	\$	-	\$		\$	-		#DIV/0!	#DIV/0!		#DIV/0!	#DIV/0!
Sponsorships	\$	92	\$	-	\$	2				0			5	
In-house Contests	\$	13	\$	0	\$	52								
Other Ads	\$	ē.	\$	=	\$	73	9							3
OrthoChats	\$	18	\$	*	\$	90			20 0 10 0				8	
Marketing SUV	\$	92	\$	2	\$	2			6 3					į.
Party Planning	\$	9	\$	0	\$	8								8
TOTALS	\$	12	\$	Q	\$	20	\$	Q	0		#DIV/0!	0	#DIV/0!	#DIV/0!
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D:\Marketing\Desktop\2018 Budget Report	<b>ROI REPORT JULY 2018</b>
	RUIREPURI JULI ZUIO

Top Dental Referrals	# Starts	tarts \$tarts		# NPEs		
	17	\$	120	45		
	9	\$	-	6		
	7	\$	77.5	16		
	6	\$	+	9		
	6	\$	*	3		
	5	\$	-	0		
	4	\$	77.5	7		
	5	\$	-	18		
		1000				



### 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





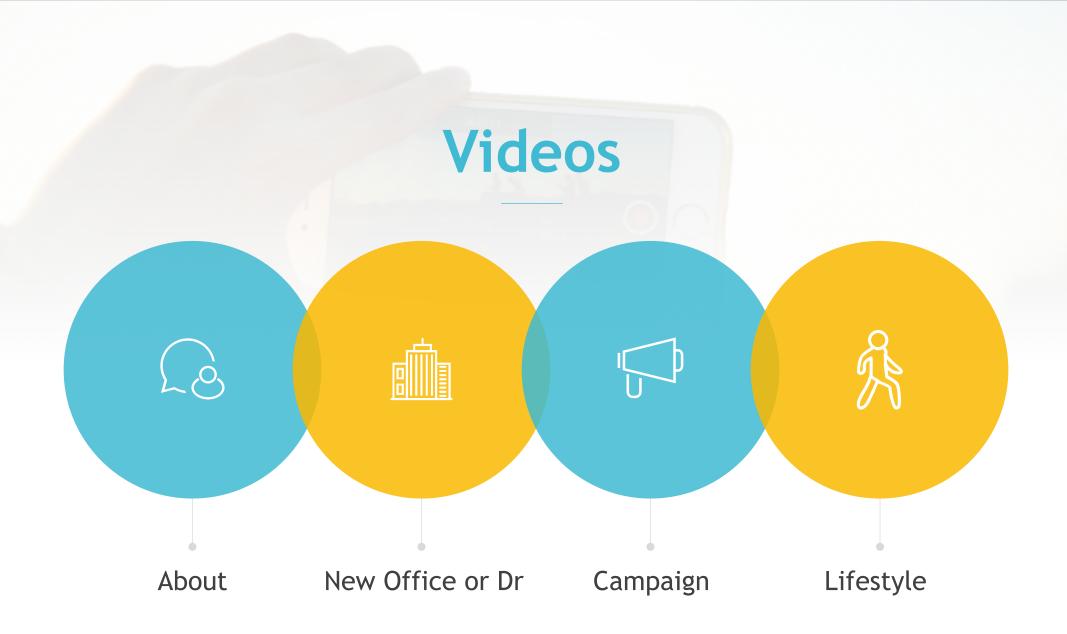






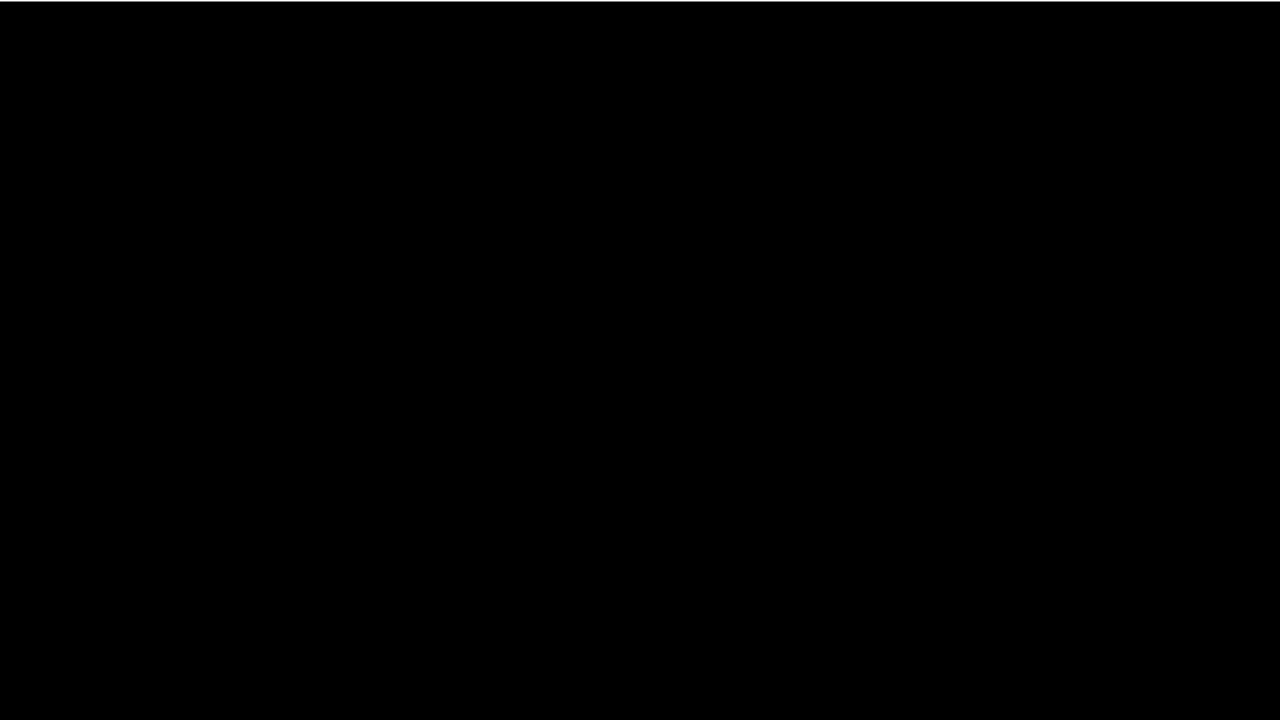














### Billboards











## Blue Wahoo's **Baseball**

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























### Staff Morale

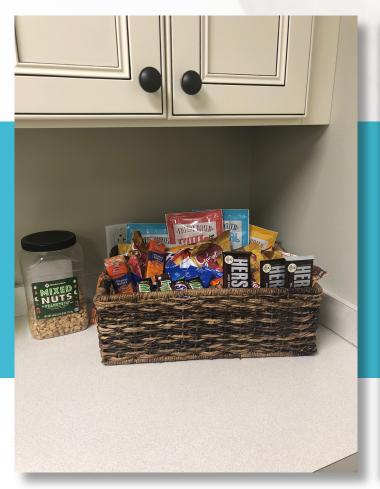
#### **Contests**

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

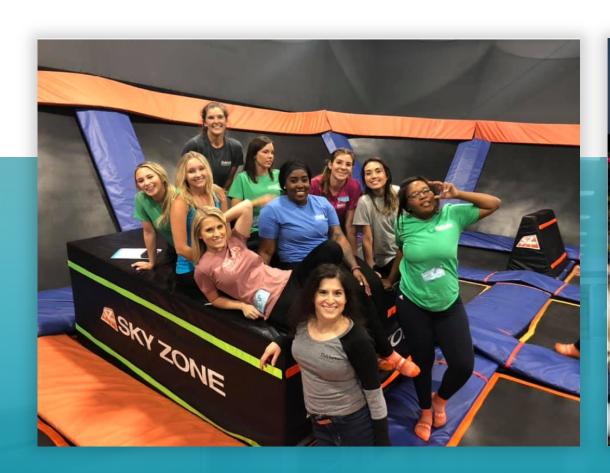
family
Integrity
Service
humility





















## Keeping Morale Up









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

### fishbein fundamentals

## fishbein fundamentals

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



March 13-14, 2020

September 11-12, 2020

fishbein

#### Fishbein Fundamentals





Sep 11-12 2020





Amanda@fishortho.com

## fishbein FOUNDATION





Fishbeinfoundation.com

### **Humane Society**

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













## 3 (Ces

mBraces



#### 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.





## FISHBEIN FOUNDATION SMEDICION STATEMENT OF THE PROPERTY OF TH

**Spring 2018 Winners** 



Kaitlyn



Kyra



Rilee

• •

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...



74 Comments • 236 Shares







# fishbein foundation



