

14 Steps to Success

Dr. Charles Moser's 14 Step Workflow for Entrepreneurs to Build a Happy, Thriving Dental Group

If you're starting out on the road to building your own dental group, we've got a plan to help guide you along the way. Developed by Dr. Charles Moser of the Dental Entrepreneur Organization, this roadmap offers 14 key steps to creating a thriving dental group from the ground up.

Remember — your end goal is to create something that helps support happiness for you, your patients, and your team!

1. Mission and Vision

First, establish your direction. Create a mission and vision that your budding team will connect to. Giving your people a real cause to work towards is key to employee engagement, retention, and productivity.

2. Core Values

Develop core values that your team can put into action and use to create a strong company culture. Your core values should matter to you — principles that you would "Go to war for or be poor for."

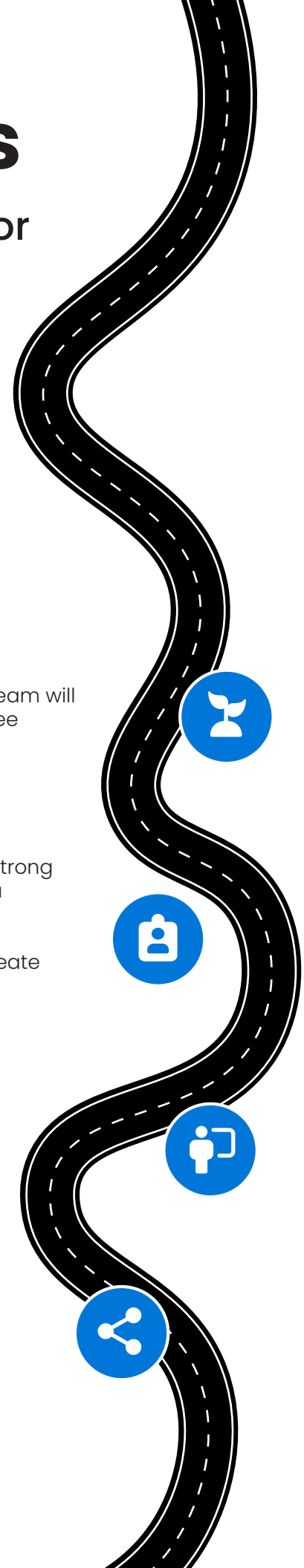
Remember: If you do NOT intentionally create your culture, the universe will create one for you — and it probably won't be what you had in mind.

3. Leadership Team

Assemble a leadership team that buys into you and your vision for the company. You want your top lieutenants to support you as a leader while also giving you honest feedback and helping you grow — and promoting a similar culture downstream.

4. Strategic Planning

Start developing a big picture plan for putting your vision into action and breaking down what that journey will look like on a quarter by quarter basis. At this stage, you may often benefit from working with consultants or executive coaches.



5. Clear Organizational Chart, and Defined Leadership Team

Establish a clear organizational chart to make sure that every member of your organization knows who they report to. Continue to build out your leadership team and support their learning and growth.

6. Defined Roles and Responsibilities

Define your team's roles and responsibilities to foster a healthy sense of ownership and accountability. In order for your team members to be successful, they must understand exactly what is expected of them.

7. Proper Meeting Structure

Develop a focused, organized approach to conducting meetings. This includes everything from the weekly team meeting to high-level leadership sit-downs and will help keep meetings on track and avoid wasting time.

8. Systems

Begin to create process-driven systems for all of your workflows. This includes daily patient care routines for dentists and hygienists, onboarding and training, and more. Writing standard operating procedures (SOPs) can be very helpful here, especially as your team grows, and will give your team the capacity and competency to be effective and accountable.

Key questions to consider: Do your team members know their jobs? Do they have the tools and resources to do their jobs? Do they have the time to do their jobs?

9. Training

Put an ongoing training and development process into place. This should be designed around the needs of your group, and may vary between departments, but will likely focus on key areas like leadership, communication, sales, conflict resolution, and accountability.

10. Recruiting

Remember, the best organizations are ALWAYS recruiting. Rather than putting up a job listing only when you have an opening (and are feeling the pressure to fill it!), your HR team should be casting a net year-round, consistently interviewing so that you've always got a stack of high-quality resumes on file.



11. Marketing Plan

Marketing is key to sustainable, predictable growth. Create a strategic marketing plan, built around an ideal patient avatar, and define clear roles and responsibilities for your marketing team so that everyone is on the same page moving forward.

12. Measuring

If you really want to grow, you need to be able to measure what that looks like. Develop KPIs across all your roles and departments, from patient care to marketing, so that your leadership team can begin to get a clear sense of the state of your organization and your month-over-month performance. This will allow you to adjust midstream, set realistic expectations and accountability, and coach your team towards

13. Compliance

Create a rigorous culture of compliance around all relevant laws and regulations. Best practices include putting the necessary tools in place like spreadsheets and forms, as well as having a team member who focuses on implementing compliance policies. This is especially important as you begin to grow.

14. Associate Development

Give your associate dentists and team members the support they need to thrive both personally, professionally, and spiritually. Create opportunities for growth and development, whether through CE courses, roundtable discussions, or a creative approach to benefits.

The End Goal

Why are you working so hard to succeed? Hopefully, to support ongoing happiness – for you, your patients, and your team!



Credits

Developed by Dr. Charles Moser, DDS, VP of Community Management for the Dental Entrepreneur Organization.

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