

A Dentists' Checklist for End of the Year Success

Every dental business owner wants to end their year with high cash flow, optimized processes, a happy staff, and an organized office. But concluding the year with all of these things in place requires a plan. That's why we created ***A Dentists' Checklist for End of the Year Success*** to guide you.

Here's how to end the year strong, and start the new year stronger.

TIP #1

Review the following financial reports for the month, quarter, and year:

- Production report
- Write-offs report
- Collections report
- Accounts receivable (A/R) report (insurance and patient)
- Daily Deposit report

Knowing the state of your financial reports paints a picture of the overall success of your business. When you analyze and understand them, and then take action based on what you learned, these reports will shape your goals and successes in the new year.

TIP #2

Take stock of your current employees' workload. Ask yourself:

- How is employee morale?
- Is everyone handling their role, or do changes need to be made?
- What could be improved?
- What could be automated or delegated?

Your team is the heart of your dental business. Their job satisfaction is crucial to your continued success. When you survey your employees, honor their questions and concerns, and offer resources for improvement, they'll produce better results and respect you more as a leader.

TIP #3

Revisit your current Standard Operating Procedures (SOPs), such as your:

- Scheduling process
- Insurance claims process
- Patient billing process
- Aging report and collections process

These specific processes are often broken or overlooked – but each one affects your bottom line. Review how effectively each workflow is completed, and ask if there are steps that can be modified, eliminated, or even automated for maximum efficiency.

We offer automated resources that will streamline your dental office's most time-consuming routine workflows. [Click here to learn more.](#)

TIP #4

Determine the state of your equipment (both clinical and administrative). Ask yourself:

- Is it in need of repairs or replacement?
- Is there equipment you need to add?
- Is there equipment you can retire?

Your technology keeps your business running smoothly. It's vital that everything works properly – especially your clinical equipment. Look into upgrading your clinical equipment, and also take note of your administrative technology that schedules appointments and collects payments from your patients. These are lifting levers to a bigger bottom line.

TIP #5

Pack your schedule

- Automate your scheduling system to get more patients in the chair without creating chaos on your calendar.
- Help your patients use their dental insurance benefits by the end of the year with a 'Use It or Lose It' campaign. [Refer to our original article for tips.](#)
- Our automated patient billing goes hand in hand with our patient scheduling services. Together, they make the beginning and end of the treatment cycle quick and convenient for patients, and hands-free for your dental team.

A full schedule is a profitable schedule. Gearing up for the end of the year can mean packing the schedule for the end of the year, or even getting patients on the calendar for the beginning of the year. Keeping production high is a great way to wrap up the current year, and start strong in the new year.

DCS offers services that will make all of these end-of-year checklist items easier. Boost your end of year revenue: [Book a free 30-minute consultation with one of our experts.](#)

Meet Moola!

Our mascot Moola is here to remind you that you'll get cash flow you can count on when we take care of your RCM.

The first step takes just 1 minute:

[Book a free consultation here.](#)

