



# AssociatesRoadmap

## Due Diligence

### Due Diligence

Assess your needs and what you can offer

Make the decision to hire an associate using the materials provided

Write a job description for the associate

Write a job description for yourself or the doctor who will serve as the mentor, with their input

Be generous with the time you set aside for this

Budget for weekly touch-base meetings to provide timely, relevant, and useful feedback

Write the ad and write a script or set of bullet points to use as you get the word out to colleagues

## Interviewing

### Interviewing

Place ads. Send out word to your colleagues and your network

Screen Resumes

Conduct Phone Interviews

Send the second-round candidates the RightFit Filter and directions. Fill out your own for both the associate and the practice

Take the results and do your working interviews. Use the provided questionnaire and have the present support staff do the same

Discuss goals, benchmarks, and other critical areas that must be discussed, adapted, and mutually agreeable with the lead candidate

Make the job offer

## Post-Hire

### Post-Hire

Set up and confirm the mentoring schedule

Supply regular feedback about patient interaction, benchmarks, and treatment planning

Have regular over-the-shoulder sessions

Conduct regular milestone checks and discuss progress toward shared future goals

Schedule and hold weekly debrief sessions

# ConflictBuster

Conversations are effortless if you know what your goals are, who you're talking to, and are prepared to answer all anticipated questions and objections—or know what you can't speak to just now. This worksheet will help you prepare in advance for effortless conversations.

| <b>Goals/Concerns Overview</b>  | <b>Managing Unknowns</b>  | <b>What You Will Say and Do</b>   |
|---|---|---|
| <p><b><u>Best-Case Outcome:</u></b></p><br><br><br><br><br><br><br><br><br><br><p><b><u>Worst-Case Outcome:</u></b></p><br><br><br><br><br><br><br><br><br><br><p><b><u>Relationship Details:</u></b><br/><i>How to get through to this person. Approaches/areas to avoid.</i></p><br><br><br><br><br><br><br><br><br><br><p><b><u>What are you unprepared to answer?</u></b></p> | <p><b><u>List items that require more information:</u></b></p><br><br><br><br><br><br><br><br><br><br><p><b><u>Gather information and write down your answers</u></b></p><br><br><br><br><br><br><br><br><br><br> | <p><b><u>List your talking points:</u></b></p><br><br><br><br><br><br><br><br><br><br><p><b><u>List your questions:</u></b></p><br><br><br><br><br><br><br><br><br><br><p><b><u>Areas of curiosity you will probe and listen for:</u></b></p><br><br><br><br><br><br><br><br><br><br> |

# DecidingWhen

## Worksheet Key

Guidance for how to use the DecidingWhen worksheet using questions raised and explored in the "Deciding When" Section of the Associates Module

### Preliminaries

Getting your assumptions wrangled

#### 1. Why do I want an associate?

The full, real reason. A good candidate will need the whole picture, so go ahead and get clear on that now.

#### 2. Am I hiring an associate to help handle the growth of the practice?

There are many reasons to bring another dentist into your practice, but all motives besides growth require an extra heard look at the numbers to make sure there will be a likely net benefit.

#### 3. Am I trying to fix something? What?

It can be tricky to fix systemic issues by adding a new person to a problematic system. Be thoughtful

#### 4. Am I trying to replace someone? Who?

You can keep headcount constant, but you can't replace individuals. Writing detailed job descriptions can help inventory the capabilities you need to have covered.

#### 5. How will an associate help these things?

A prompt to visualize and map out exactly how the associate will be deployed, and will help question assumptions.

#### 6a. What is required to provide the associate with in order to accomplish these goals and keep my patients happy?

Wrangle the inventory of possible issues and ways to handle them.

#### 6b. How will we provide these things?

Just sketch out the needs now for patients, time, support, feedback, etc. The numbers come in the next section.

#### 7. What do I risk or stand to lose in hiring an associate?

Needs to be considered. For all you may gain, what are the risks if weak points fail? Go back to the top of the list and add or change anything.

#### 8. Considering all of the above, is it still a good idea to hire an associate?

A "no" just means you've found other steps to take first, so don't avoid that answer.

### RightFit

Research these and answer. Answers with are best.

What can we offer an associate with respect to:

#### 1. Patient flow and opportunities to treat

Sufficient to earn attractive salary?

Enough to make per-hour practice production goals?

#### 2. Mentoring. How much time can be made for:

Over-the-shoulder sessions

Regular meetings to discuss progress and needs

#### 3. Efficient practice systems, efficiencies, and support staff

Is this a practice with minimal organizational overhead, or will a new hire need help learning idiosyncrasies and working around ad-hoc systems?

#### 4. Incentives

Will you use your existing structure, or a new one? Is everyone happy with how your current incentives drive business and motivate doctors?

#### 5. Opportunity for future growth

Are you able to reasonably offer a new doctor enough patients to grow in there career based on your marketplace?

#### 8. Considering all of the above, can your practice offer what's required to attract the kind of associate you want?

A "no" just means you've uncovered other steps to take first, so don't avoid that answer.

# DecidingWhen

Use this worksheet to record your answers from the Deciding When Section of the Associates Module

A mutual right fit is the secret to a good professional relationship.  
Honest answers help direct an informative and constructive conversation.

|  |  |  |  |
|--|--|--|--|
| 1. Why do I want an associate? Am I hiring them to help handle growth?               | 2. Am I trying to fix something? What? | 3. Am I trying to replace someone? Who?                    | 4. How will an associate help these things?                                    |
|  |  |  |  |
| 5. What does the associate need to accomplish our goals and keep our patients happy? | 6. How will we provide these things?   | 7. What do I risk or stand to lose in hiring an associate? | 8. Considering all of the above, is it still a good idea to hire an associate? |
|  |  |  |  |

# DecidingWhen: What You Can Provide

Use this worksheet to record your answers from the Deciding When Section of the Associates Module

A mutual right fit is the secret to a good professional relationship.  
Honest ratings help direct an informative and constructive conversation.

|   |                                  |  |
|---|----------------------------------|--|
| 1. Patient flow and opportunities to treat? | 2. Mentoring                     | 3. Practice systems, efficiencies, and support staff                         |
|   |                                  |  |
| 4. Incentives                               | 5. Opportunity for future growth | 6. Considering all of the above, can attract the kind of associate you want? |
|   |                                  |  |

# DecidingWhen

## Other Perspectives

Looking at the situation from other perspectives can help you see things easily that you might not otherwise  
Use this worksheet to record your answers from the Deciding When Section of the Associates Module

### Patients

What will the change look like to them? What will you need to do to help them through the transition? What else?

### Your Team

How will the team affect and be affected by this decision? What are their needs?  
Will teams reshuffle? Hire more support staff?

### The Prospective Associate

What are they walking into?  
What will they notice and interact with first and most?

## Scoring Key: Practice Eyes Only

# RightFit Interview Key

Share your assessments with the candidate and pay attention to their responses with the following things in mind

## RightFit Practice Notes for Scoring

- 1. Practice provides patient flow and treatment opportunity**  
Capturing and maximizing treatment opportunities is the number one challenge in dentistry. Share your numbers. Does the candidate seem interested and engaged? Hungry? Do they have followup questions?
- 2. Practice provides systems, efficiencies, and solid support staff**  
An associate can best serve meet personal and practice goals when they can focus on treating patients and learning. Your polices around diagnosis and treatment planning will inform their performance. How much friction will they encounter at your practice as it is today?
- 3. Practice provides mentoring**  
The most valuable thing you can offer an associate is an education in treating patients, working as part of a team, and learning the business of dentistry. Think back, or ask for perspectives. Do you know what to provide? Do you have the resources to provide it?
- 4. Provides incentives**  
Incentives keep your associate keyed into their personal motivation as they follow your guidance to achieve practice and personal goals. How effective are the incentives you can offer?
- 5. Provides opportunity for future growth**  
Don't create a frustrating situation—or unintended competition—by running out of room for a successful associate to grow within the practice. Are you able to offer the kind of career and earning growth that will satisfy the kind of associate you want to hire?

Total:

/25

## RightFit Associate Notes for Scoring

- 1. Production at chair (per hour, per day)**  
How do they feel about their numbers? Do they desire to maximize their opportunities to treat? Probe and discuss how they see the relationship between production and patient care outcomes. Is it compatible with yours?
- 2. Diagnosis and treatment planning (\$ per exam)**  
Ask: "What are your expectations of patient flow, your production, and your treatment planning?" The first question is about their need and desire for money. This question is about what they are willing and able to do to get there.
- 3. Doctor Team Performance (hours and days worked)**  
Questions: Are you available to work? Are there any barriers to your full and flexible availability?
- 4. Performance targets and patient satisfaction**  
"How would you rate your performance in terms of satisfied patients to date? Why?" Listen for their assumptions and concepts of what patients want, as well as evidence of a growth mindset and coachability . "What goals have you set and how did you fare?" Listen for the mind behind the goals. Listen for their experience in methodically achieving success.
- 5. Team feedback and culture fit**  
"Describe how you work with your team." "How well do you fit with your current company culture? Why?" "What have you done to maximize this relationships?"

Total:

/25

# RightFit: Interview

Both interviewer and candidate fill out both sides of this assessment

A mutual right fit is the secret to a good professional relationship.  
Honest ratings help direct an informative and constructive conversation.

## RightFit Practice

Rate the Following From 1-5

1. Practice provides patient flow and treatment opportunity

2. Practice provides systems, efficiencies, and treatment staff

3. Practice provides mentoring

4. Practice provides incentives

5. Practice provides opportunity for future growth

Total:

## RightFit Associate

Rate the Following From 1-5

1. Associate's production at chair (per hour, per day)

2. Associate's diagnosis and treatment planning (\$ per exam)

3. Associate's Doc team performance (hours and days worked)

4. Associate's performance targets and patient satisfaction

5. Associate's team feedback and culture fit

Total:

# RightFit: Mentoring

## Over-the-Shoulder

Keep these questions in mind during the working interview, mentor observation, and daily practice.  
Mentors, teammates, and the associate all use this sheet to record their answers and notes.

|  |  |  |   |
|--|--|--|---|
| 1. Is the associate comfortable talking to patients?                                 | 2. How is the associate's tone?  | 3. Nonverbals: Looking into the eyes, sitting knee-to-knee?          | 4. Are they listening, and allowing the patient to guide the conversation?      |
|  |  |  |   |
| 5. Does the associate validate responses as if they agree? As if they are a patient? | 6. Does associate choose good moments to move into "Here is what I suggest"? | 7. Does associate emphasize that "I/We will take great care of you"? | 8. Do they have a soft touch and controlled movement around the mouth and face? |
|  |  |  |   |

# 4BlockRoles: Dentists

## FCTD

From Growth Platform's Management Suite. Use this as a job description, discussion resource, and review rubric.

### FACE TO FACE

Everyone in the practice needs to practice good Face-to-face. If we connect warmly on a human level to establish trust and open communication, we can give exceptional care to patients and support each other as a team. As a Doctor, you lead a clinical team and must also serve as an example of how to do this successfully.

**Making an empathic connection with each patient**  
**Superior physical/verbal/mannerism presentation**  
**Positive comments about the team**  
**Arranging and making post-op follow-up calls**

### COMFORT

A successful practice is built on patient comfort. Providing for and protecting the comfort of each patient builds on and deepens trust and allows the patient to accept our diagnoses and recommended treatments as being in their best interest.

**Applying expert control of instruments and a light touch**  
**Practicing flawless injection technique: needle selection, administration site, etc.**  
**Combining quadrants and bundling treatment for restorative**  
**Using mouth props and rubber dams when appropriate**

### TREATMENT

As a dentist, you have a commitment to performing excellent, caring treatment. As a producer in the practice, you have a commitment to hitting your benchmarks and performing your duties efficiently. Keeping your clinical abilities sharp and focusing on patient comfort are how you bring value to patients, support the team, and contribute to the success of the practice.

**Maintaining superior four-handed efficiency with assistants**  
**Documenting and presenting intraoral photos. Every patient, every time.**  
**Aiming for an unprompted "Wow" from the patient to before and after photos**  
**Meeting and exceeding your production benchmarks**

### DIAGNOSIS

Your ongoing mastery of clinical abilities and people skills will enable you to develop efficiencies that allow you to diagnose dentistry accurately and present it persuasively to ensure that patients understand their options for treatment while staying on track with your production benchmarks.

**Performing all hygiene checks in less than four minutes**  
**Using intraoral pictures to present treatment options**  
**Prescribed and presenting treatment without dental jargon**  
**Treating the patient, not the insurance: commitment to facilitate, book, explain, and financially coordinate with the patient according to their needs**

# Scoring Key: Practice Eyes Only

## RightFit Mentoring Key

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- 2. Diagnosis and treatment planning (\$ per exam)**  
Probe: Where is their mind w/r/t treatment planning? Are they deepening their grasp on how to give patients what they want? How small procedures build trust? Ask how they present treatment to get a sense of their understanding and delivery, and to test their comfort and compliance in a coaching conversation.
- 3. Doctor Team Performance (hours and days worked)**  
Ask for self-assessment and deliver any feedback about their overall contribution to the efforts of the practice in terms of their availability.
- 4. Performance targets and patient satisfaction**  
Ask for self-assessment and deliver any feedback about patient satisfaction. Discuss adherence with plans and progress toward goals. How do they relate to the expectations and plans in place? Are clarifications and modifications necessary? Any specific help?
- 5. Team feedback and culture fit**  
Ask for self-assessment and deliver any feedback about team interactions and culture participation.

Total:

# RightFit:Mentoring

To measure mentoring progress, rate the associate here according the explanatory worksheet

## RightFit Practice

Rate the Following From 1-5

1. Practice provides patient flow and treatment opportunity

2. Practice provides systems, efficiencies, and treatment staff

3. Practice provides mentoring

4. Practice provides incentives

5. Practice provides opportunity for future growth

Total:

## RightFit Associate

Rate the Following From 1-5

1. Associate's production at chair (per hour, per day)

2. Associate's diagnosis and treatment planning (\$ per exam)

3. Associate's Doc team performance (hours and days worked)

4. Associate's performance targets and patient satisfaction

5. Associate's team feedback and culture fit

Total: