

Exploring Efficiency at Marshall Orthodontics

PwC



MEET THE TEAM



SKYLER GONCI
HR INNOVATION
STRATEGIST



AVA AMBROSE
RESOURCE STRATEGIST



MATTHEW POLAK
COST ANALYST



KATE SCHWAB
OPERATIONS ANALYST



HUNTER SOMMERKAMP
TECHNOLOGY ANALYST

Goals of happiness and efficiency!



Solution Snapshot

Employee Feedback

Monthly feedback per group
Quarterly company-wide meeting
Evaluate environment dynamics

Onboarding & Recruitment

Standardized recruiting schedule
Standardized interview criteria
Detailed onboarding plan

CRM Automation

Test and implement a “Zap”
integrating Podium and Google
Workspace to automatically reach
out to new patients

KPI Reporting

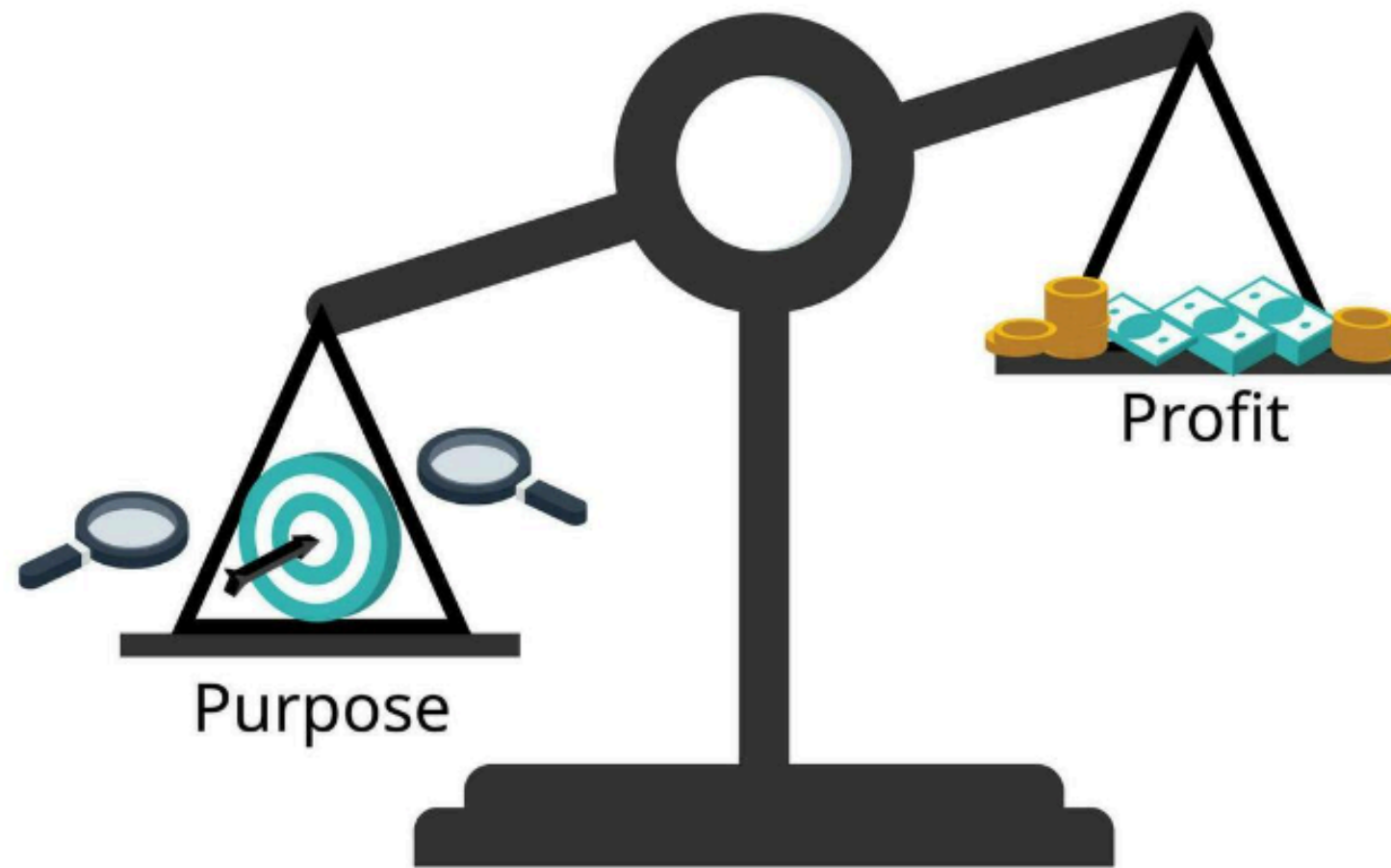
Use Tableau to integrate systems
together to create a KPI dashboard
divided into business function

The Business Opportunity

Dr. Marshall has been contemplating growth via building or buying a new office but recognizes the value of a strong foundation before exploring a specific path of expansion.

How can we best address operational efficiency while prioritizing organizational culture and the value of human capital?

Focusing Solutions



- The focus isn't solely on profit but on fostering alignment between initiatives and employees.
- Improving processes can enhance work experience
- More efficient processes allow team to redirect their efforts towards activities that generate profit
- Optimizing employee satisfaction leads to company success!

Agenda

Business Overview

Key Areas of Interest

Final Recommendations

Questions for our Team

Marshall Orthodontics Business Canvas

Key Partners <u>Professional Dental Referrals</u> Smile Place - Dr. Leanna Shetler Tylan Creek Family Dentistry Family Dental Health - Dr. Julia Vance & Dr. Hannah Roth <u>Vendor Partners and Suppliers</u> Philips Align Technology, Inc. Boyd Industries Amazon <u>Owner & Investors</u> Dr. William Marshall	<u>Key Activities</u> - providing quality orthodontic services - maintaining a comfortable and relaxed atmosphere - staying up to date with technology and materials - fostering a practice that is attentive to patients dental needs and caring for their wellbeing	<u>Value Proposition</u> - Personalized orthodontic care prioritizing patient comfort, confidence, and well-being. - Emphasis on excellence, integrity, and patient-centric practices. - Commitment to delivering exceptional service and fostering lasting relationships	Customer Relationships - Healthcare industry business, requires a high trust in the job being done right - Personalized care - Reputation to upkeep	Customer Segments - Can be divided by treatments and sociodemographics - Treatments: aligners, braces, surgical orthodontics, early, teen, adult - Sociodemographics: typically middle to upper middle class clients, roughly 35-40% of clients are adults, primary target is mothers with children -Currently serves 1430 active patients
	<u>Key Resources</u> - Renowned team - Relationships with dentists - Exceptional reputation - Office values and culture		Customer Channels - Brick and Mortar location in Simpsonville, SC - Plot of land in Greenville, SC but no expansion plan - Interactive website; consultation requests - Marketing: combination of digital and patient referrals -Review and comments	
Cost Structure - The most significant costs include payroll, cost of goods sold, and advertising costs. - Payroll is a fixed cost that is vital to continued operations - Both cost of goods sold and advertising costs are variable expenses. - Advertising costs consist of roughly 10% of expenses - Cost of goods sold represent 30% of expenses - Payroll expenses take up around 60%			Revenue Streams -The one revenue stream flows from orthodontic correction	

Being a Great Place to Work



Feeling valued and empowered to help one another

Finding the Best Way of Doing Things



More time doing meaningful work

Key Areas of Interest



**Employee
Feedback**



**Onboarding and
Recruiting**



**CRM
Automation**



Reporting KPI's

Business Group

Cadence

Format

Business Admin

Monthly

**One on Ones with Dr. Marshall
Meetings with Leadership Team and Dr.
Marshall**

Finance Dept.

Monthly

One on Ones with Dr. Marshall

Clincial

Monthly

**Anonymous/Known Respondent Surveys
Meetings with whole group and Dr.
Marshall**

Company Wide Recommendations

- Quarterly meeting
- Monitor and adjust feedback criteria to verify relevance to roles
- Ensure feedback is available after the meeting and communicate the next steps
- Promote active involvement in altering the feedback process to best address employee needs

Survey Thematic Insights

Considering Remote Work

Investigating remote possibilities may improve flexibility, addressing employees' desire for more flexibility.

Explore Team Social Outings

Improving social connections beyond work may improve social dynamics in work.

Exploring Managerial Dynamics

Align jurisdiction between CEO, leadership team, and employees, promoting macro management

Assessment of Managerial Dynamics

- **Evaluating the current value proposition**
- **Diving deeper into executive oversight dynamics**



EFFECTIVE INTEGRATION



RECRUITMENT

STANDARDIZED TIMELINE

- AVOID PROLONGED VACANCIES
-

INTERVIEWING

STANDARDIZED INTERVIEW CRITERIA

- ENSURES CONSISTENCY AND FAIRNESS
-

ONBOARDING

COMPREHENSIVE ONBOARDING PLAN

- CLEAR LEARNING OBJECTIVES AND ASSESSMENTS

CRM AUTOMATION - NEW-PATIENT INTAKE



1

Implement Zapier Integration
software

Patient fills out consultation request form

- Send text through Podium
- Send email through Google Workspace

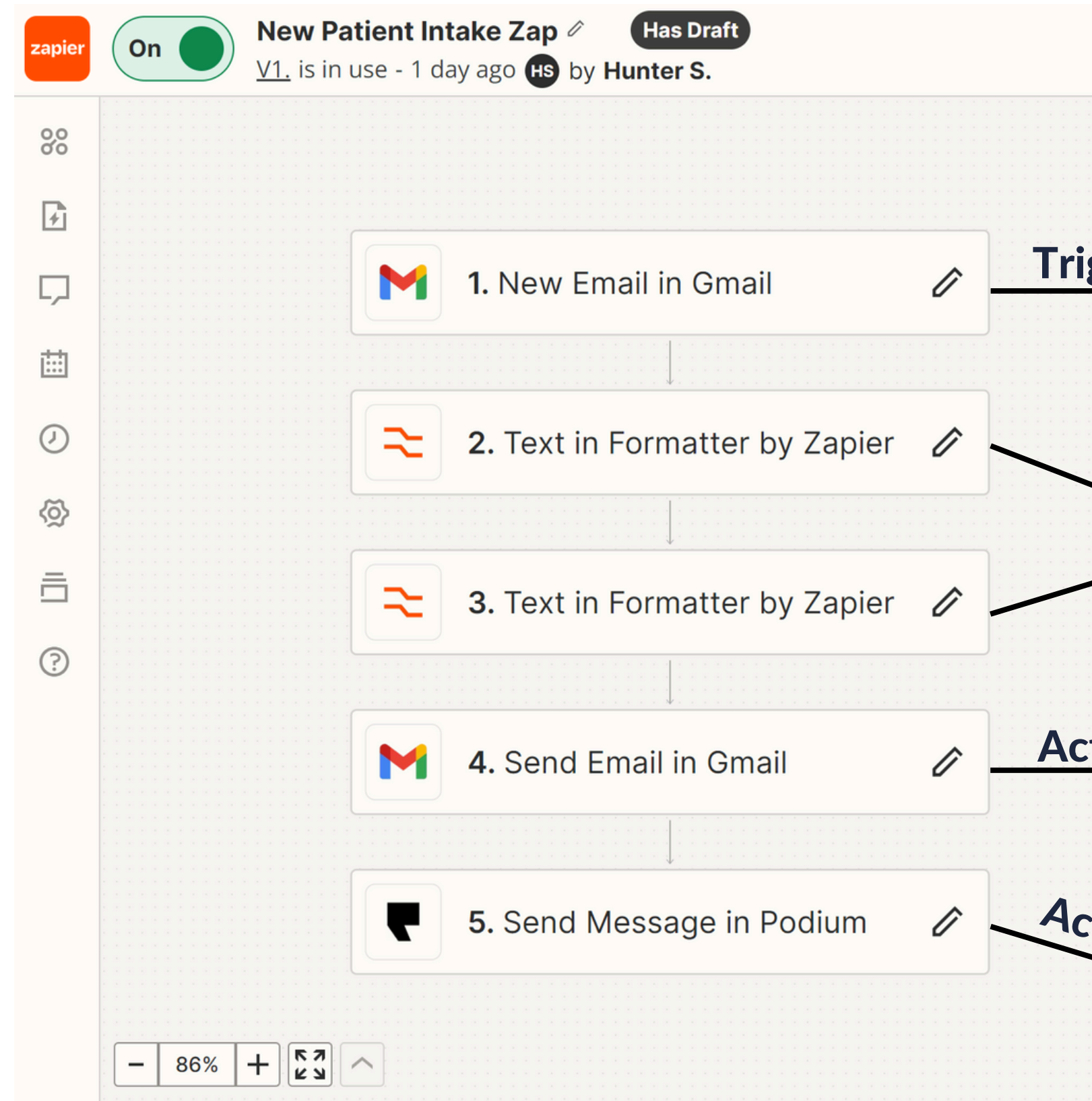
2

Assign staff member to own the “Zap”
and Learn its functionality

3

Expand on the “Zap” to perform more
tasks, Further streamline process

NEW PATIENT INTAKE ZAP



****Potential new patient fills out consultation request form on website****

- Email containing patient's name, email, and phone number is received

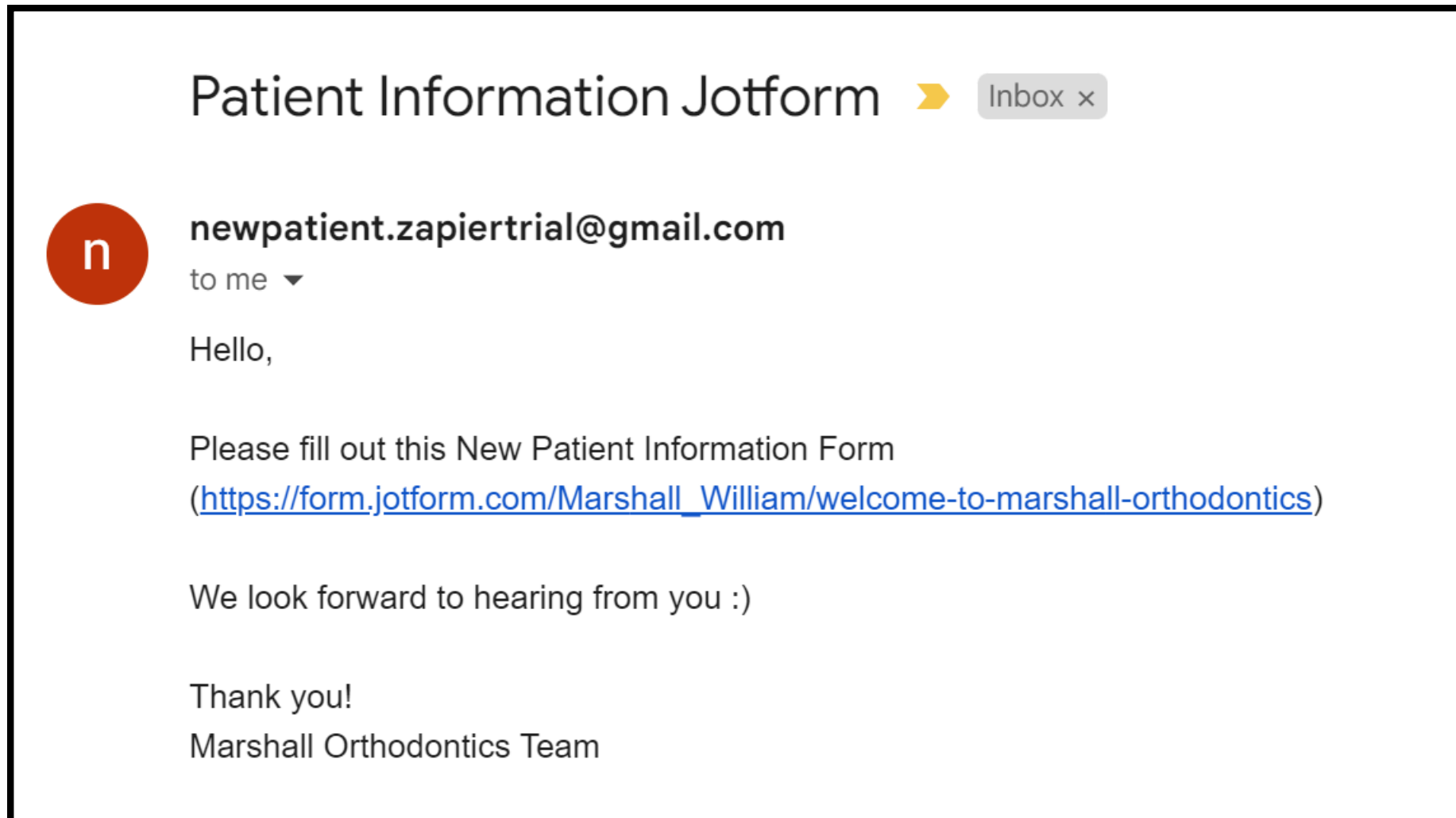
- New patient's email and phone number are extracted

- New patient is emailed to fill out New Patient Information JotForm

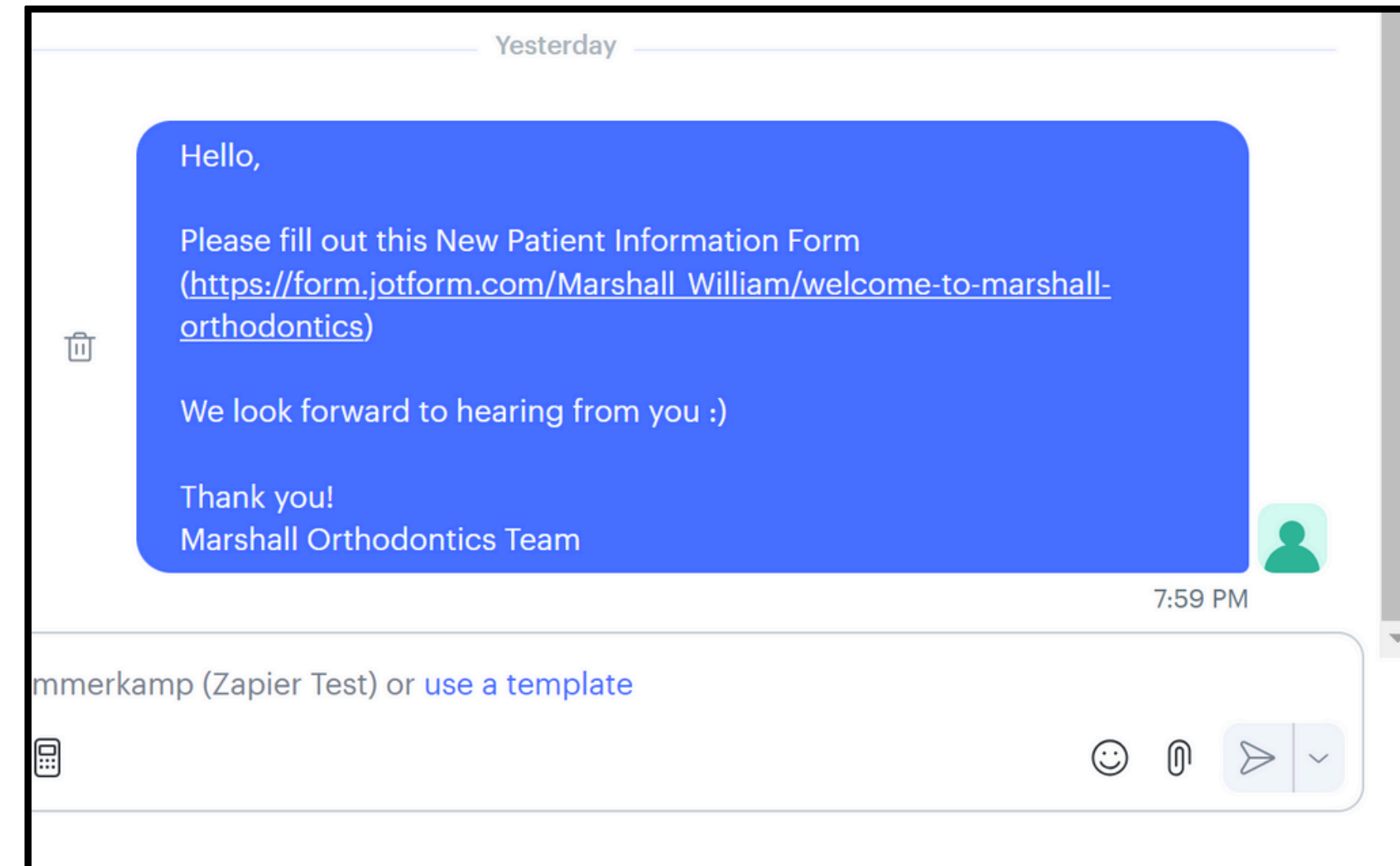
- New patient is also sent phone message through Podium to fill out Info Form

NEW PATIENT INTAKE ZAP

EMAIL - GOOGLE WORKSPACE

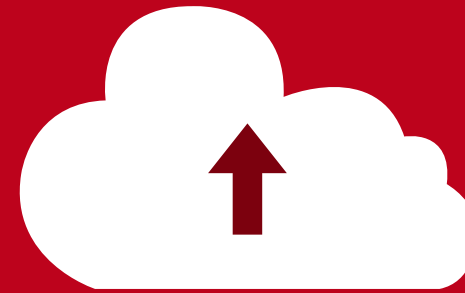


TEXT MESSAGE - PODIUM



CURRENT KPI SYSTEM

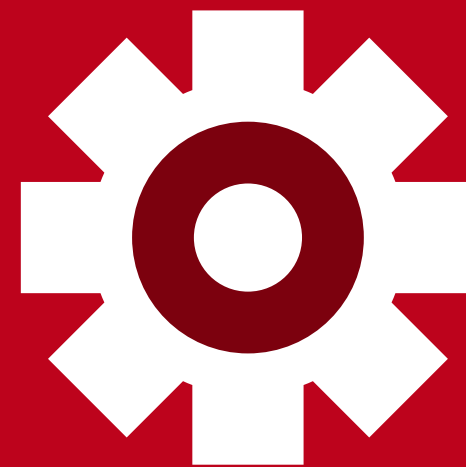
"GAIDGE"



Automatic KPI Reporting



Monthly cadence



Collects practice statistics

Current System VS. Industry Standard

NEW PATIENT'S SCHEDULED ✓
TREATMENT STARTS ✓
CONVERSION % ✗
NET PRODUCTION ✓
NET COLLECTIONS ✓
% OF PATIENTS OVER ESTIMATED TX TIME ✗
% OF APPOINTMENTS THAT ARE REPAIR/EMERGENCY APPTS ✗
AVERAGE APPTS NEEDED TO COMPLETE ORTHODONTIC CASE ✗
REFERRALS FROM DENTISTS ✓
REFERRALS FROM EXISTING PATIENTS ✓
REFERRALS FROM OTHER SOURCES ✓

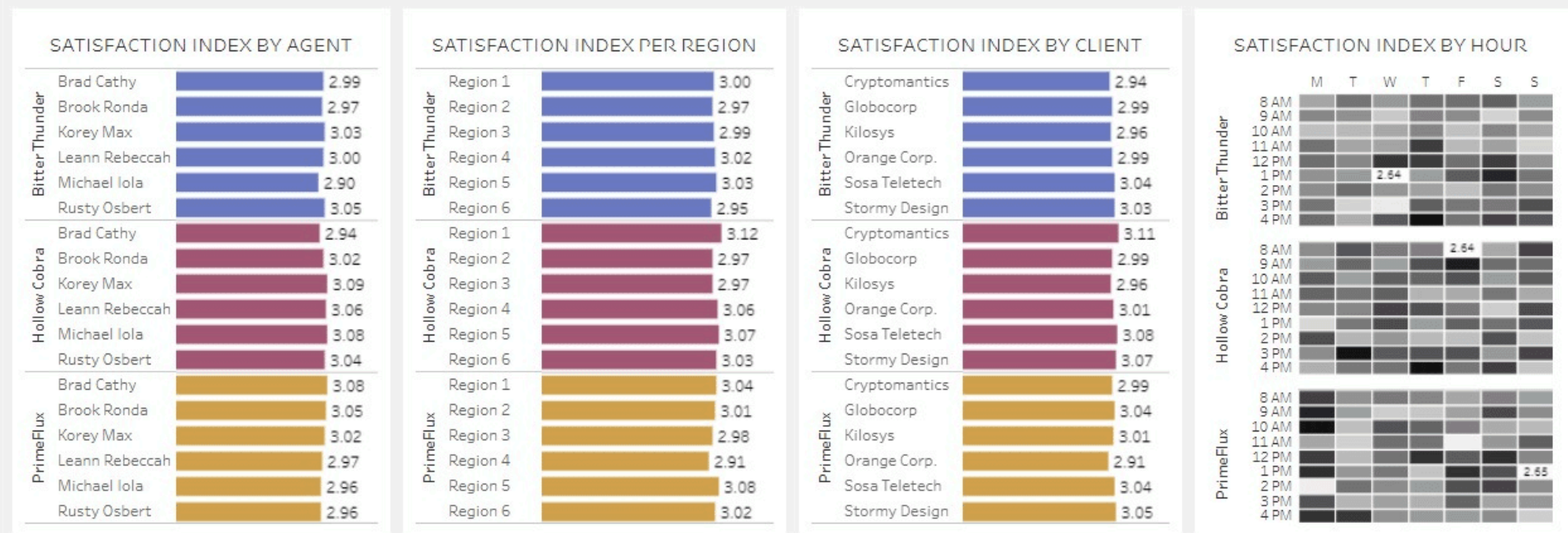
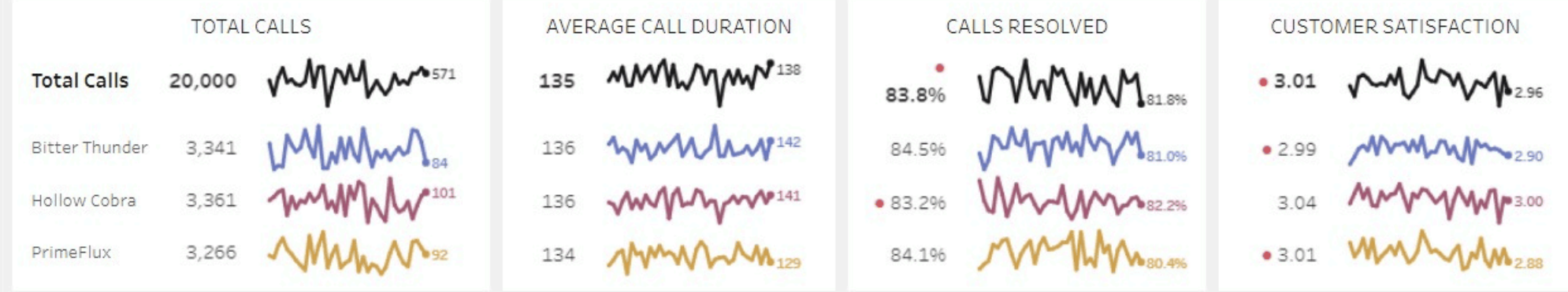
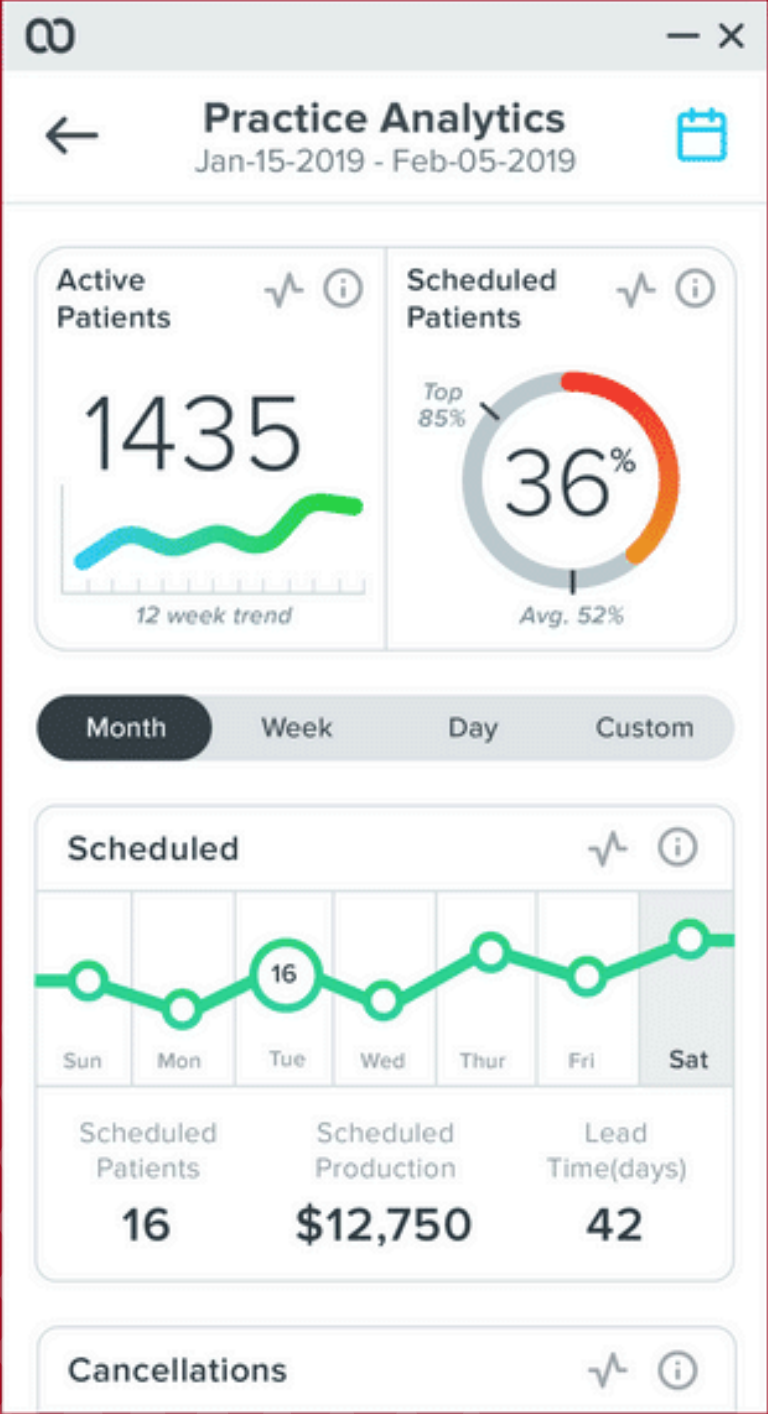


Our Solution: Tableau

Tableau is a data
visualization software

It is capable of linking data from all current
software into one or more dashboards that
can be broken into business function.

Tableau KPI Dashboards



Solution Takeaways

Employee Feedback

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APPENDIX A: NEW PATIENT INTAKE ZAP DEMO

The screenshot displays the Zapier web editor interface for a workflow titled "New Patient Intake Zap". The interface includes a top navigation bar with the Zapier logo, a status indicator "On" with a green toggle, and the title "New Patient Intake Zap" followed by "V1. is in use - 2 hours ago" and "by Hunter S.". A blue "Edit Zap" button is located in the top right corner. The main workspace shows a vertical sequence of five steps connected by downward arrows:

1. New Email in Gmail (Gmail icon)
2. Text in Formatter by Zapier (Zapier icon)
3. Text in Formatter by Zapier (Zapier icon)
4. Send Email in Gmail (Gmail icon)
5. Send Message in Podium (Podium icon)

Each step has a small edit icon (pencil) to its right. On the left side of the workspace, there is a vertical sidebar with icons for various actions: a grid icon, a document icon, a comment icon, a calendar icon, a clock icon, a settings icon, a list icon, and a help icon. At the bottom left, there are zoom controls showing "86%" and a full-screen icon. At the bottom right, there is a circular icon with a play symbol and a version number "ver. 2024/04 2022-04-08 14:00".