

## *Q-3, SEPT-2006, Analysis of SUPER REPORT - DR. EXAMPLE*

### **2005 vs. 2004 To-Date Comparisons:**

#### **FINANCIAL Summary:**

*— Doing Well*

- ☺ Your **PRODUCTION** is... \$98,094 [ \$10,899 /month], 10% **higher** than last year, projected in 2005 to be.. \$1,455,540
- ☺ Your **COLLECTIONS** are.. \$65,225 [ \$7,247 /month], 60% **higher** than last year, projected in 2005 to be.. \$1,437,960
- ☺ Your **EXPENSES** are..... \$3,123 [ \$347 /month], 1% **higher** than last year
- ☺ Your **PROFITABILITY** is... 51% so far this year as compared to 49% last year

#### **STARTS Summary:**

*— Ph-II Fees are Too Low, Use Ph-II Fee Schedule*

- ☺ Your **FULL Starts Difference** is.. 18 , 11% **higher** than last year
  - ☺ Your \$5,012 average Full start FEE is \$126 **higher** than last year
- ☺ Your **Ph-II Starts Difference** is... 8 **higher** than last year
  - ⊗ Your **\$3,856 average Ph-II start FEE is (\$111) lower** than last year
- ☺ Your **Ph-I Starts Difference** is.... 12 **higher** than last year
  - ☺ Your \$2,444 average Ph-I start FEE is \$5 **higher** than last year
- ☺ Your **LIM Starts Difference** is... -3 **higher** than last year
  - ☺ Your \$5,011 average LIM start FEE is \$23 **higher** than last year
- ☺ Your **% Initial Payments** are. 32% , which is within the 25% to 35% ideal range

#### **EXAMS & Tx Consults Summary:**

*— Needs Marketing*

- ⊗ Your **EXAMS** are..... (24) , -7% **lower** than last year
  - ☺ Your **OBS** placed (total for exams & consults) represents 23% of your exams this year with a two-year average of 21%
  - ⊗ Your **Will-Call-Back** is..... 27% , **higher** than the suggested 12% maximum
  - ☺ Your **No-Tx Wanted** is..... 1% , lower than the suggested 6% maximum
- ☺ Your **Tx Consults** are... 4 , 3% **higher** than last year
  - ☺ Your **Will-Call-Back** is..... 26% , higher than the suggested 12% maximum
  - ☺ Your **No-Tx Wanted** is..... 1% , lower than the suggested 6% maximum
- ☺ Your **REFERRAL PATTERN** is.... 44% dentist and 56% patient/other, a healthy pattern for your practice

### **Operational Summaries:**

#### **Daily Treatment Summary**

*— Doing Well*

- ☺ You work an average. 14.7 *days/month with a goal of 14.5* and work an average of 7.5 *hours/day; a productive day*
- ☺ Your average *patients/day* is.. 52 , and your Average Appointment is 28 minutes long
- ☺ Your *Failures/Cancellations of*. 4% is lower than the suggested 12% maximum
- ☺ Your *SOS/Emergencies of*..... 3% is lower than the suggested 8% maximum
- ☺ Your % of Full Starts DeBANDED is.. 112% – which is about what it should be
- ☺ With an Appt. Efficiency of 82%, a Tx Mechanotherapy Efficiency of 108%, a clinical staff utilization of 90%, a deband rate of 112% your Tx Mechanotherapy is under control, although you might want to add another week between appointments where warranted.

### Team Staffing Summary

— Adequate for Growth

- ☺ Your Chairside DA staffing is at.... 2.3 and you have 3 available
- ☺ Your Records Tech staffing is at... 0.4 and is done by the DA's
- ☺ Your T.C. staffing is at..... 0.8 and you have 1 available
- ☺ Your Receptionist staffing is at..... 0.9 and you have 1 available
- ☺ Your Bookkeeper staffing is at..... 0.8 and you have 1 available

#### Team Utilization (Ideal = 80% to 90%)

Clinical Team Utilization Rate is.... 90%

Total Team Utilization Rate is..... 87%

☺ You run an efficient team

### Year to Date Trends:

#### Conversion Ratios Summa OBS adjustment = 1%

— Doing Well

- ☺ Your SALES ABILITY is..... 79% higher than the suggested 75% minimum
- ☺ Your adjusted **This Month Exam** Conversion Rate is..... 80% , higher than the suggested 75% minimum
- ☺ Your adjusted **Year-to-Date Exam** Conversion Rate is..... 84% , higher than the suggested 75% minimum
- ☺ Your adjusted **12-Month AVG Exam** Conversion Rate is... 81% , higher than the suggested 75% minimum
- ☺ Your **Ph-I/Ph-II** Conversion Rate is 77% , higher than the suggested 75% minimum
- ☹ Your **OBS Conversion Rate** is..... 40% , lower than the suggested 65% minimum

#### Full Starts/Day – FS/D

— Adequate for a Little Growth

- ☺ Your 12-month average FS/D is... 1.65 and you have 6% growth left in your 1.75 FS/D schedule, for the days worked/year

#### Monthly % Past Due

— Surpassed Goal

- ☺ Your Past Due is..... 13% – below the suggested 20% maximum

### Goal Summary (Year to Date):

#### New Patient Exams Goal

— Below Goal

- ☹ Your New Patient Exams to date are 17 , [ -6% ] lower than your goal of 1297

#### Production (Charges) Goal

— Above Goal

- ☺ Your Production to date is..... \$66,750 , [ 7% ] higher than your goal of \$1,017,000

#### Collections Goal

— Above Goal

- ☺ Your Collections to date are... \$58,470 , [ 6% ] higher than your goal of \$1,050,000

#### Expense Budget Goal

— Surpassed Goal

- ☺ Your Expenses to date are..... \$488 , [ 0% ] lower than your goal of \$542,700

#### Full Starts/Month Goal

— Above Goal

- ☺ Your Full Starts/Month to date are... 23.6 , [ 15% ] higher than your goal of 20.5

## *Considerations!*

- ☺ You are doing well so far and are reaching most of your goals.
- ☺ Your Ph-II fees are much lower than last year: follow your new Ph-II Fee
- ☺ Your exams are dropping off and you need more marketing: see attached programs and call me to implement those that you feel will work for you.
- ☺ Your OBS conversions are much too low, you need OBS Control: see attached program and call me to implement it. With decreased exams, OBS Recall Control is even more important to have under control.
- ☺ I will call you to set up a time to discuss this quarterly analysis.