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Dr. Dustin Burleson developed specific approaches to recruiting and training his staff members, including Johnna Thomas (background at left) and Ashley Barnholdt.

On the Cover

Orthodontic Team Development



Dr. Doug Depew, pictured leading a wire-bending workshop for orthodontic staff at the 2016 Annual Session, developed an AAO-endorsed training program for orthodontic staff.

Featured

Orthodontic Team Development

- 2 Recruitment, Training and Retention of Orthodontic Staff
- 5 Intensive Upfront Training, Emphasis on the "Why" Enhance Employee Performance
- 8 Building and Developing Your Team: Ideas and Tools from the AAO

In Every Issue

News Bites

- 18 Monthly AAO Consumer Website Visits Up 6,100 Percent Year-Over-Year
- 20 AAO Outlines Student Debt Concerns in Letter to Senate Committee Planning to Re-Authorize the Higher Education Act
- 22 New Executive Director Joins AAO Foundation

Risk Management

- 24 Orthodontic Staff Can Prevent or Cause Malpractice Claims

People

- 26 Accolades
- 27 In Memoriam

Featured Resources

- 28 Enjoy the Convenience of the Member App
- 28 AAO Consumer Blog Educates the Public about Orthodontic Topics

Meetings

- 29 Upcoming Professional Meetings



Dr. Dustin Burleson is pictured with his team.

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Orthodontics

Building and Developing the Orthodontic Team

Employment in orthodontic offices is growing. In 2017, practicing AAO members in the United States and Canada responded to the AAO Economics of Orthodontics Survey, which included the biennial Patient Census Study. The survey requested 2016 data from members about their practices and their patients.

Survey responses indicate that:

- In 2016, members employed an average of nine full-time staff, an increase from seven in 2014.
- The part-time staff member average of two in 2014 increased to three in 2016.
- Since 2010, one in five AAO members had consistently reported employing 10 or more full-time staff; in 2016, the number increased to one in four employing 10 or more full-time staff.
- The greatest increase by job category in 2016 was for clinical staff, increasing 31 percent.

As member practices grow and the need for additional staff becomes critical, safeguarding the doctor's investment in staff with effective recruitment practices, strong training programs and benefits that address employees' needs may become more challenging. Below, two AAO members with noted expertise in staff training provide insights on these challenges.

Creative Approaches to Recruitment, Training Yield Excellent Team Members

After completing the orthodontic residency program at the University of Missouri – Kansas City, **Dr. Dustin Burleson** opened his first practice in Kansas City, Missouri in 2006. The multidisciplinary practice, which also included a pediatric dentist, had one to two staff members until 2009.

"Then we began to grow rapidly," says Dr. Burleson. "We now have two orthodontists and one pediatric dentist, and usually have 28 to 30 employees in our four offices—located in Kansas City and the Missouri suburbs of Liberty, Raymore and Excelsior Springs."

The Liberty and Excelsior Springs offices were purchased from previous orthodontic owners. Dr. Burleson established the Raymore office.

Over the course of building a large team, Dr. Burleson developed his own methods of recruiting and training employees because he was not comfortable with more typical approaches to these tasks.

"I know a lot of practices use online services like **Indeed.com** to recruit employees and the doctors feel that works well," he says. "But as I considered that approach, several things concerned me. First of all, who are the people who will apply for your opening? If you advertise that you prefer orthodontic or dental experience, your local applicants may be working for orthodontic colleagues or for some of your referring dentists. It might be tempting to hire these individuals, but you don't want to negatively impact your relationships with your colleagues. And despite the experience that they have, if you hired them, you would still have to train them on how things are done in your practice."

Dr. Burleson determined early on that recruitment in his practice would be based on networking - including in unexpected situations.

"All doctors in our practice have business cards with their photos included to help everyone we meet remember who we are,"

he says. "In my experience, a lot of great people are already employed, although not necessarily in dental offices. You can find them in stores or restaurants, for example, and that's what we do. When we meet someone who is highly capable and over-performing in an entry-level job – demonstrating a positive attitude, outstanding customer service and interpersonal skills and problem-solving ability – we give that person a business card. We invite them to contact us if they are ever looking for a job, and some do so. That way, we always have candidates on file who have already been screened for abilities that we consider important and whose personalities would fit well in our practice. When you are screening applicants from a job board listing, it can be difficult to tell who might be the right hire."

Effective Onboarding Is Essential to Good Employment Outcomes

Bringing in new employees from a variety of work backgrounds forced Dr. Burleson to think quickly about how to bring them up-to-speed and ready to succeed in a busy orthodontic practice.

"I developed a 120-hour program that details every movement in every position in the practice," says Dr. Burleson. "It covers everything from opening the office to setting up for bonding and everything in between and beyond. As employees demonstrate competence in each area, we get a feel for their greatest areas of strength." The program also includes a welcome-sequence of emails as well as videos of procedures and thorough descriptions of each position.*

While Dr. Burleson does not object to the common practice of having new employees "shadow" experienced staff, he cautions against relying on that approach, pointing out that providing all standard operating procedures on paper and video helps ensure consistency.

"It can sometimes be the case that what you hear a new employee is learning does not mesh with how you thought the phones were being answered or how you thought records were being processed," he says. "It's like that old 'telephone' game that kids play – as something is shared from one person to another multiple times, at some point the message changes."

Prior to hiring, Dr. Burleson uses the Kolbe Corp system, which provides tools for assessing how well a candidate's instinctive approach to a given task meshes with what it takes to succeed in a particular team role.

"I like using the Kolbe system because bringing some data into the process helps balance the 'gut instinct' that you might have about a particular candidate," he says. "It is a helpful indicator of individual strengths that relate to positions like treatment coordinator, insurance coordinator, lab specialist, front desk receptionist chairside assistant, etc."

AAO Resources and Contact Information

Telephone: 800-424-2841 or 314-993-1700
Fax: 314-997-1745 **E-mail:** info@aaortho.org
websites: aaainfo.org (member website)
 mylifemyle.org (public website)

AAO Annual Session:
 D.J. Hamen, ext. 530 or dhamen@aaortho.org
 Pam Hoffmann, ext. 560 or phoffmann@aaortho.org

AAO Foundation:
 Jackie Bode, ext. 546 or jbode@aaortho.org

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 Call the AAO Endorsed Insurance Office at 800-622-0344 or send an e-mail to aaainsurance@aaortho.org

Executive Office:
 Lynne Thomas Gordon, ext. 512 or lthomasgordon@aaortho.org

Finance and Administration:
 Casandra Scales, ext. 507 or cscales@aaortho.org

Governmental Affairs and Legal Questions:
 Kevin Dillard, ext. 525 or kdillard@aaortho.org
 Sean Murphy, ext. 523 or smurphy@aaortho.org

Library Services:
 Jackie Hiltner, ext. 542 or jhiltner@aaortho.org

Communications and Marketing:
 Kerlie Maassen, ext. 535 or kmaassen@aaortho.org
 Pam Paledin, ext. 524 or ppaledin@aaortho.org

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Dr. Nahid Maleki, President
 Lynne Thomas Gordon, CAE, Executive Director
 Gail Gardner, Editor
 Kerlie Maassen, Contributing Writer
 Pam Paledin, Contributing Writer
 Julia Byrne, Graphic Designer

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Photo by Burleson Orthodontics.

Dr. Dustin Burleson complements his practice's intensive onboarding program with ongoing training and in-depth interaction with staff members about work processes.

Communication is Essential for the Well-Functioning Team

As staff members settle into positions and gain experience, Dr. Burleson protects his investment in them with frequent communication and sharing of the cultural values and operational standards of the practice.

"In particular, when some of our staff came to us with the practices that we purchased, we realized it would take some ongoing support for them to learn and identify with our approach to doing things," says Dr. Burleson. "We tried to make the process interactive: 'Show me how you would do this. What approach would be in the best interest of the patient?' As the dialogue continued, we shared with the individual how our thinking evolved and why it works well in our practice."

"Also, I'm a strong believer that all employees can benefit from time together away from the office," adds Dr. Burleson. "We block out a day each quarter for this purpose. Each quarter, we have three to five big goals that we discuss in our off-site meetings, and follow up with individuals throughout the quarter: 'What is working well? Where do you need help?' On a daily basis we ensure that team leaders and our office manager have open lines of communication."

Beyond effective hiring practices, strong training programs and ongoing communication, Dr. Burleson has found that benefit planning is also essential to good staff retention and longevity outcomes.

"Our benefits have changed over the years because we listened to our employees," says Dr. Burleson. "We offer medical and dental insurance, a 401k program and one week of paid time-off. I don't necessarily think that formula is right for every practice, though. Again, what's important to your employees? For example, if you are located near a large military base, you may find your team has a lot of military spouses who share in the service's benefits. They might prefer a more generous paid-time-off policy."

Dr. Burleson also offers educational benefits and believes an education benefit is worth considering for most practices.

"We want to support gaining any type of knowledge, even in non-orthodontic areas," he says. "Assistance with educational expenses is a popular benefit with our employees. We have had eight employees go on to dental school, two who received MBA degrees and several who completed dental hygiene programs. Eventually, some will move on, but while they are with your practice you will have employees who are motivated by learning and building self-confidence in many areas – and that can only benefit your practice."

* Dr. Burleson makes his onboarding program available through his management consultancy Burleson Seminars. Learn more at burlesonseminars.com.