

Office Manager Training and Manual Content

This Office Manager Manual and Training videos are designed for your Office Manager to have the full suite of documents, letter templates, scripting and training videos at your fingertips.

You will be able to use the materials to work on the training based on the schedule that *Shimmin Consulting* and your consultant develop together. This material will also be useful for training a new Office Manager to receive the same proven results that the *Shimmin Consulting* team has been providing clients for years.

Documents Included:

Summary of Reports due at End of Month
Targets for Your Practice
Traits of a 75+ Conversion Rate
Case Acceptance Rate Impacts
Practice Financials
 Practice Goals – Prod. and Collections
 Calculating Practice Production Goals
 Quarterly Tracking And Analysis Report
 Production Goal Input Spreadsheet
Treatment/Appointments/Scheduling
 Common Orthodontic Treatments
 Common Orthodontic Appointments
 Developing a Schedule Template
 Scheduling Template Configurations
Staff Development
 Vision Statement Instructions and
Worksheet
 Team Goal Setting Worksheet
 Goal Sheet – Staff
 The Four Agreements
 Creating the Dream Team
 Confidential Team Survey
 Role Playing – Observation Form
 Mystery Patient Phone Call Worksheet

Documents Included (Continued):

Employee Benefits
 Staff Empowerment Calendar
 Introduction and Direct Bonus Structure
 Direct Bonus Structure Worksheet
 Introduction Bonus Structure Flyer
 Multi Office Bonus Program
 Employee Treatment Benefit Letter
Detailed Job Descriptions for all positions
Clinical Training
 Orthodontic Assistant Training Instructions
 Orthodontic Assistant Training Checklist
Business Meetings
 Monthly Business Meeting Worksheet
 Monthly Business Meeting Agenda
 Action Item Meeting Follow-up Worksheet

Videos Included:

Becoming An Effective Manager (+1 CE Credit)
Millennials In The Workplace (+1 CE Credit)
Office Manager Manual Training