

OPERATIONAL TASKS



- ✔ Review and update patient registration forms and consent documents.
- ✔ Evaluate and update office policies and procedures for the new year.
- ✔ Conduct an inventory of supplies and equipment and order replacements as needed.
- ✔ Schedule maintenance and repairs for equipment.
- ✔ Review and update marketing and promotional materials (see Marketing & Growth section).
- ✔ Plan employee training and development activities for the new year.
- ✔ Investing in staff development enhances skills and keeps the practice at the forefront of dental advancements.
- ✔ Conduct employee performance reviews and set goals for the new year. Providing constructive feedback and discussing professional development goals for the upcoming year fosters a culture of continuous improvement within the practice.
- ✔ Evaluate technology needs and update software or hardware if necessary.
- ✔ Backup all data and ensure disaster recovery plans are up-to-date.
- ✔ Be sure to reach out to your PMS provider to determine the best process for this task.

FINANCIAL TASKS



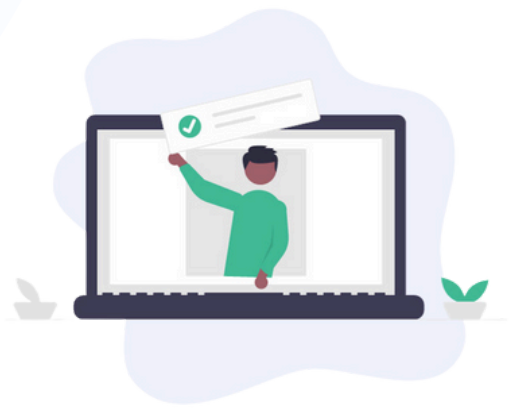
- ✓ Review and analyze financial statements: Identify areas of strength and weakness, track key metrics like collection rate and profitability, and compare it to previous years.
- ✓ Create a budget for the upcoming year: Project expected revenue and expenses, allocate resources effectively, and adjust budgets based on year-end performance.
- ✓ Finalize insurance contracts and negotiate rates for the new year.
- ✓ Review and update fee schedules: Ensure that your practice's fees are competitive and reflect any projected cost of providing services. A list of standard fees for procedures can be found on the ADA website.
- ✓ Review and analyze accounts receivable (A/R): Identify overdue accounts, calculate net receivables, and develop a plan for collection. Use software like Pearly to stay on top of your A/R collection efforts.
- ✓ Reconcile bank statements and ensure financial records are accurate and up-to-date.
- ✓ Finalize payroll and taxes for the year.

CLINICAL TASKS



- ✓ Review and update clinical protocols and guidelines.
- ✓ Conduct a quality assurance review of patient care. There is a great ADA resource on this task here:
<https://www.ada.org/resources/practice/practice-management/patients>
- ✓ Update patient charts and records and make sure that their handling is HIPAA compliant.
- ✓ Review and update infection control protocols.
- ✓ Identify and implement new technologies to improve patient care. Be sure to be subscribed to publications/resources that will keep your practice on the cutting edge of the industry.

MARKETING & GROWTH TASKS



- ✔ Develop a marketing plan for the new year. Sometimes it's best to be inspired by what similar practices are doing for their outbound marketing.
- ✔ Identify target populations and develop targeted marketing campaigns. A good place to start is often addressing inactive patients in your system.
- ✔ Track and analyze the effectiveness of marketing campaigns. While this can be done with a spreadsheet, there are marketing software solutions specifically designed for dental practices.
- ✔ Develop and implement new patient acquisition strategies.
- ✔ Review and update online presence, including website and social media profiles. While your practice doesn't need to post every day, make sure that your contact info and operating hours are up-to-date.
- ✔ Participate in community events and networking opportunities.
- ✔ Build relationships with referral sources.
- ✔ Develop and implement patient loyalty programs.
- ✔ Evaluate the effectiveness of the patient recall system. Implementing strategies to encourage patients to schedule appointments for the next year helps maintain a steady flow of patients and supports preventive care efforts.
- ✔ Develop and/or implement an in-house membership program. Practice success guide for membership programs here:
<https://www.pearly.co/dentistry-huddle/training-your-team-on-dental-membership-plans>

ADMINISTRATIVE TASKS



- ✓ Review and update employee handbooks and personnel policies. The CDA offers a good resource for updating your current handbook:

<https://www.cda.org/Home/Practice/Practice-Support/Employment-Practices/Employee-Manual-Resources>

- ✓ Ensure compliance with all relevant regulations and laws.
- ✓ Renew licenses and permits.
- ✓ Update contact information for patients and insurance companies.
- ✓ Organize and archive records.
- ✓ Set goals for the new year and develop a plan to achieve them.
- ✓ Schedule regular team meetings to discuss progress and address challenges.