

## LEADERSHIP BY DESIGN ASSESSMENT

**Desired outcome:** The objective and thorough assessment of your practice’s current status in the 12 key areas of dental office management that are critical to your success. Use of the survey results to proactively plan for continued improvement and prosperity. Annual reassessments after this initial survey that show improvement in all applicable areas.

**Measurement:** Observation and feedback from the doctor and/or management team about the results of the survey and the applicability of the information to the practice being assessed. Review of subsequent annual reassessment.

**Instructions:** Place a check mark under the appropriate column that indicates whether you have, do not have, or partially have each item listed. Then, under the column **Priority**, prioritize each item as it relates to your business using the following indicators:

A= very important    B= important    C= useful (but not very important)    D= unimportant

Assessment completed for (doctor/practice): \_\_\_\_\_

Assessment completed by: \_\_\_\_\_ Date: \_\_\_\_\_

Date reassessment scheduled for: \_\_\_\_\_

| DO YOU HAVE . . .   | Yes | No | Partial | Priority |
|---|-----|----|---------|----------|
| 1. A written and frequently verbalized mission statement with yearly objectives that clearly define how you want your business to operate?  |     |    |         |          |
| 2. An enthusiastic, dedicated, and well-trained staff?  |     |    |         |          |
| 3. These manuals and comprehensive programs:  |     |    |         |          |
| (a) Personnel and administrative manuals that address the “legal issues” of being an employer?  |     |    |         |          |
| (b) A (standard operating) procedures manual that includes criteria-based performance agreements, task inventories, evaluation forms, a training schedule, and SOPs that clearly define who does what, when, and precisely how? |     |    |         |          |
| (c) A safety and OSHA compliance program?   |     |    |         |          |
| 4. A comprehensive marketing plan that addresses:   |     |    |         |          |
| (a) Internal marketing?   |     |    |         |          |
| (b) External marketing?   |     |    |         |          |
| (c) Service strategy?   |     |    |         |          |

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COMPLIMENTARY SAMPLE from *Standard Operating Procedures for All Dentists*

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 A model operations manual for the dental office that comes complete on computer disk for easy customization. For more information contact: **Marsha Freeman & Associates** P.O. Box 68 ♦ Nipomo ♦ CA 93444 Phone (800) 253-2544 ♦ Fax (805) 929-0931 ♦ Email [marsha@fix.net](mailto:marsha@fix.net) ♦ Website [www.marshafreeman.com](http://www.marshafreeman.com)

Leadership by Design Assessment / 2

A= very important    B= important    C= useful (but not very important)    D= unimportant

| DO YOU HAVE . . . (Continued)   | Yes | No | Partial | Priority |
|---|-----|----|---------|----------|
| 5. A quality assurance program that includes:   |     |    |         |          |
| (a) Written standards of care for all clinical treatment?   |     |    |         |          |
| (b) Written standards for patient service?  |     |    |         |          |
| (c) Routine performance reviews?  |     |    |         |          |
| (d) Periodic third party reviews?   |     |    |         |          |
| (e) Routine questionnaires to patients and referring doctors?   |     |    |         |          |
| 6. A risk management program, with regularly reviewed educational and preventative components?        |     |    |         |          |
| 7. Regular staff meetings, including  |     |    |         |          |
| (a) Morning huddles?  |     |    |         |          |
| (b) Monthly staff meetings?   |     |    |         |          |
| (c) Team meetings?  |     |    |         |          |
| (d) Management meetings?  |     |    |         |          |
| (e) Advisory meetings?  |     |    |         |          |
| 8. A staff recognition program?   |     |    |         |          |
| 9. An aggressive continuing education program for the staff and doctors?                              |     |    |         |          |
| (a) Conventions?  |     |    |         |          |
| (b) CE courses?   |     |    |         |          |
| (c) In-service programs?  |     |    |         |          |
| (d) Correspondence courses?   |     |    |         |          |
| (e) Staff management educational components?  |     |    |         |          |
| 10. A team of advisors whom you respect and trust, including:   |     |    |         |          |
| (a) Accountant?   |     |    |         |          |
| (b) Financial planner?  |     |    |         |          |
| (c) Attorney?   |     |    |         |          |
| (d) Banker?   |     |    |         |          |
| (e) Insurance broker?   |     |    |         |          |
| (f) Dental specialists?   |     |    |         |          |
| (g) Dental consultant(s)?   |     |    |         |          |
| 11. A financial plan that addresses both short-, medium-, and long-term goals in the following areas: |     |    |         |          |
| (a) Production and income?  |     |    |         |          |
| (b) Budgeting and forecasting?  |     |    |         |          |
| (c) Managed care?   |     |    |         |          |
| (d) An employee compensation package?   |     |    |         |          |
| (e) Retirement?   |     |    |         |          |

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Leadership by Design Assessment / 3

A= very important    B= important    C= useful (but not very important)    D= unimportant

| DO YOU HAVE . . . (Continued)  | Yes | No | Partial | Priority |
|--|-----|----|---------|----------|
| (f) Growth and acquisition of:   |     |    |         |          |
| 1) Staff?  |     |    |         |          |
| 2) Equipment?  |     |    |         |          |
| 3) Facility?   |     |    |         |          |
| 4) Associates or partners?   |     |    |         |          |
| (g) Marketing?   |     |    |         |          |
| (h) Tax planning?  |     |    |         |          |
| (i) Daily, monthly, quarterly, and annual monitoring of statistics?  |     |    |         |          |
| (j) Emergency funds?   |     |    |         |          |
| (k) Comprehensive insurance coverage?  |     |    |         |          |
| 12. A management library containing books, tapes, magazines, and professional journals to update and expand both dental and general business skills and knowledge? |     |    |         |          |

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