THE CHANGING ROLE OF THE DENTAL OFFICE MANAGER
Research Methodology

This report analyzes the results of the online survey titled “The Changing Role of the Dental Office Manager.” It includes the answers from 1,171 dental office managers who took the survey between May 5, 2016 and June 5, 2016.

Executive Summary

This nationwide survey covered a range of topics, including new patient appointing, staff training, practice marketing, social media and online reviews – all from the perspective of the dental office manager. Responses were also compared with a previous Futuredontics' dental office manager survey of the same title to identify changes over time.

The findings revealed several interesting trends, including increasing concerns regarding the ability to dedicate sufficient time to practice marketing, new patient acquisition and keeping the schedule full – the three driving forces responsible for practice growth and long-term success.
"Patient interaction" is viewed as the single most important business activity

"Keeping the schedule full" is the #1 growth-related business concern

Office managers are spending more time on the three top-ranked growth-related business activities:
   1. Practice Marketing
   2. New Patient Acquisition
   3. Keeping the Schedule Full

68% of office managers say their practices are adequately staffed

Office managers are concerned that they are spending less time on staff training than in 2014

Office managers feel not enough time is spent on the following activities:
   1. Staff Training
   2. Dormant Patient Reactivation
   3. Practice Marketing
   4. New Patient Acquisition
   5. Keeping the Schedule Full

58% of office managers block out 1-4 hours per day specifically to accommodate new patients

23% of practices do not set aside any time for same- or next-day appointments

40% of respondents say their practice offers an online option for scheduling appointments

Office managers said they are spending too little time training staff in the following areas:
   1. Marketing (e.g. social media, reviews, etc.)
   2. Scheduling
   3. Technology (e.g. Zoom, CEREC®, etc.)

Office managers ranked the following as their top three most important practice marketing activities:
   1. Practice Website
   2. Online Reviews
   3. Search Engine Optimization (SEO)

Office managers now see video testimonials as an important practice marketing activity

Printed yellow pages and billboards/bus benches are viewed as the least important marketing activities

Office managers are primarily responsible for managing their practice's social media and online reviews

One-third or more of office managers say they’re spending too little time on social media and online reviews

The majority of offices are not using software to monitor their online reputation
Demographics

The online survey was open to all dental office managers nationwide.

Respondents represented various levels of experience within the industry – the largest percentage (40%) were tenured office managers with 15+ years of experience, followed by those with 5 years’ experience or less (27%), and 6-10 years (20%). The smallest group represented included managers with 11-15 years’ experience (15%).
Consistent with previous research, over 90% of office managers surveyed were female. The majority of respondents (62%) were over 45 years old with 25% identified as 55 or older. Only 15% were 35 years old or younger.

More than half of our respondents (53%) support a single dentist practice with the next largest group (34%) falling into the category of backing a practice comprised of 2-3 doctors. In our view, this reinforces a fairly consistent industry norm of a 1:1 ratio of office manager to lead dentist.

In regards to staff supervision, our largest group of office managers (58%) supervised a team of more than 5 staff members. Concurrently, 68% felt they had an adequate number of persons on staff. Thus, the statistics present a consistent picture that while a majority of office managers are tasked with many duties, it appears they have enough support staff to take on the necessary areas of practice marketing and patient interaction in addition to those everyday tasks of appointment follow-ups, insurance processing, etc.
**Practice Business Activities**

We began our survey by asking office managers which activities they consider to be “very important” to the success of their practice. The top answers as reported by half or more of all respondents neatly illustrate the dual nature of a practice management professional’s role. It all boils down to Day-to-Day Operations vs. Practice Growth.

**Identify “Very Important” Business Activities**

<table>
<thead>
<tr>
<th>Operations</th>
<th>Growth</th>
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<tr>
<td>Patient Interaction</td>
<td>Keeping the Schedule Full</td>
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<tr>
<td>Staff Training</td>
<td>New Patient Acquisition</td>
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<tr>
<td>Appointment Reminders</td>
<td>Practice Marketing</td>
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<tr>
<td>Insurance Processing</td>
<td>Dormant Patient Reactivation</td>
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On the operations side, office managers are balancing highly interactive responsibilities requiring a personal touch (e.g. directing patient interactions and staff training) with those of a more analytical or clerical nature like overseeing the coding/submitting of insurance claims and sending appointment reminders.
When it comes to growth, office managers report that their #1 concern is "keeping the schedule full." Patient attrition is a major problem facing all practices. Even the best run office can expect to lose between 8% and 10% of their patients every year just to individuals moving out of the area.\textsuperscript{1} So it's easy to see why "patient acquisition," "practice marketing" and "dormant patient reactivation" were all identified as very important activities by managers.

We then asked office managers whether the time they're spending on these “very important” activities has increased, decreased or stayed the same compared with two years ago. While more than 50% of respondents reported that the time dedicated to “patient interaction,” "staff training" and "insurance processing" remained unchanged from 2014, significant increases were seen in the amount of time spent on activities required to market and grow the practice. The biggest decreases were primarily in operations-related functions.

**Time Spent on “Very Important” Business Activities**

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<th>Increased</th>
<th>Decreased</th>
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<tr>
<td>Practice Marketing</td>
<td>Appointment Reminders</td>
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<tr>
<td>New Patient Acquisition</td>
<td>Dormant Patient Reactivation</td>
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<tr>
<td>Keeping the Schedule Full</td>
<td>Staff Training</td>
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\textsuperscript{1}
Why is this shift taking place? A variety of factors are likely driving the increase in the time that office managers are spending on growth activities. These include:

- **Increasing competition** – There are currently 195,722 practicing dentists in the U.S.\(^2\) This represents a nearly 10% increase in the number of dentists who were working in 2006.\(^3\)

- **Shrinking demand** – 75% of dental practices experienced production declines since the Great Recession.\(^4\) The frequency of adult dental visits has been steadily declining since 2003.\(^5\)

- **Dental income stagnation** – Since 2005, real income for general dentists has not kept pace with inflation.\(^6\)

- **Consumer awareness** – Thanks to the internet and review sites like Yelp, consumers have the ability to research and compare dental practices like never before.

There are three points worth commenting on regarding the "very important" business areas where office managers report a decrease in time spent. First, the now virtually industry-wide use of automated patient communication systems like PatientActivator\(^®\) easily explains the decline in time spent on appointment reminders. Secondly — and quite importantly — by spending less time on dormant patient reactivation, office managers are missing out on a prime opportunity to grow revenues. Finally, the fact that office managers are spending less time on “staff training” raises a red flag. A significant number of survey respondents (46%) are worried about this as we’ll see in the next set of charts.

Next, we wanted to understand how appropriate office managers feel this division of their time is when it comes to the eight “very important” business activities. Across the board, the majority of office managers feel their practice is devoting the correct amount of time to the each of the areas.

What we found interesting is that nearly one-third or more identified five trouble areas where they feel more time must be spent in order to ensure the success of the practice.
With the exception of “staff training” — which is notoriously time-consuming, all of the top areas that office managers felt “too little time” was being devoted to revolved around practice growth. There is likely a variety of reasons why activities like practice marketing and new patient acquisition are not getting the amount of attention office managers feel they deserve. These range from the time-intensive nature of developing and implementing an effective practice marketing program to feeling that "no amount of time is enough" caused by the pressure to increase patient rolls.
New Patients & Appointing

As previously shown, office managers consistently rank “new patient acquisition” and “keeping the schedule full” among their most important tasks – and for good reason. According to a recent consumer survey, 74% of dental patients say their choice of dentist is significantly impacted by how easily and quickly they can book an appointment. In that spirit, we asked office managers about their new patient processes.

How much time does the practice block each day for new patients?

![Chart showing distribution of time blocked for new patients]

How soon do you typically see a new patient after the initial phone call?

![Chart showing distribution of time to see a new patient]

Over one-half of respondents (57%) reported that they block out 1-4 hours per day specifically to accommodate new patients.

That said, it’s important to note that 23% of offices do not set aside any time for same-day or next-day appointments. This is a major issue if it means that these practices are unable to get patients on the schedule in a timely manner. We call it “new patient neglect.”

The news is mixed on the patient appointing front. On the positive side, the number of dental practices who see a new patient within 48 hours has increased by 17% since 2014. Dental practices are finally catching up with patient preferences by offering immediate appointment availability and scheduling new patients within the first two days. Although there is still need for much improvement in this area, the trend has been strongly positive.
As the keepers of the practice schedule, office managers are to be commended for this change, which will directly impact the practice's new patient acquisition success. Today, 37% of office managers report following the best practice of seeing new patients within 48 hours of their initial call. However, while approximately 38% see new patients within one week the number of practices doing this has actually dropped slightly since 2014.

We next asked office managers how the practice accommodates new patients who call looking for an appointment after business hours.

How does your practice address patients who contact you after office hours for an appointment?

- **73%** Sent to voicemail
- **45%** Phone number for emergencies
- **15%** Patients can schedule appointment online
- **14%** Call forwarded to designated office phone
- **9%** 3rd party service takes the call
- **10%** Call forwarded to designated staff member
73% of respondents reported that after-hours calls are sent to voicemail and returned the following business day (although almost half at least provide an emergency number). This represents a huge lost opportunity, as many consumers will continue searching for another practice that can accommodate them immediately, and others will simply hang up and fall back into procrastination.

Approximately 14% of respondents indicated after-hours calls were being forwarded to a designated office cell phone which may clarify why calls forwarded to staff members are declining. A surprising number of office managers regularly check voicemail over the weekend and will return the call if it is an emergency.

Additionally, approximately 22% of practices have adopted a system where after-hours patients can speak with someone immediately – either by forwarding calls to a staff member’s phone or using a third-party appointing service.

Dental offices are actively addressing the important area of online and after-hours appointing. With the practice website becoming a more central repository for patient interaction, this is increasingly becoming a clearinghouse for patient/office interaction.

The importance of offering an online appointing option cannot be overstressed. According to a recent study by Futuredontics, over 40% of high-value dental patients want to be able to request dental appointments online. This number is growing fast. To meet this need, members of 1-800-DENTIST’s new patient leads program are connected to an online self-appointing platform which allows patients to self-schedule appointments in a window of times pre-approved by the practice.
Staff Training

Our research shows that "staff training" represents an area of significant challenge for office managers. As previously shown, training is recognized as the second most important operations-related business activity. Yet, it’s an area that office managers are actually spending less time on than in 2014 and — to make matters worse — the majority of survey respondents realize is getting "too little time."

The picture regarding staff training gets even murkier as we take deeper look at the following survey responses:

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<tr>
<th>Rate in order of importance staff training for the following areas:</th>
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<th>Which areas of staff training are you spending more time on compared to 2 years ago?</th>
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<th>Which areas of staff training do you believe you are spending too little time on?</th>
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What does this all mean? Based upon our analysis, we believe that while the key operations-related functions (e.g. proper patient interaction, scheduling and insurance processing) are viewed as the most important areas for training — they are in many ways (with the exception of scheduling) the most easy to learn.

Growth-related activities – specifically marketing – are an entirely different story. While office managers report an increase in time spent training they also report it as the #1 area where they feel not enough training time is spent. This is likely due to a variety of reasons, chief of which is the complexity of teaching someone to navigate the ins and outs of a rapidly evolving digital marketplace that includes everything from websites, Facebook ads, social media posts, Yelp reviews, etc.

Learning to become an effective marketer takes years of education and experience. Unlike insurance processing, it’s not something that can be easily taught in days or weeks. This is why many practices rely on outside professionals to handle their practice marketing instead of trying to bring staff up-to-speed on an area of expertise that lies outside their natural skill set.
Patient Communications

It’s abundantly clear from our office manager survey participants that they have stepped-up their efforts to engage with patients on a regular basis.

Which of the following patient communications does your practice engage in?

**WE DON’T DO THIS**

<table>
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<tr>
<th>Service</th>
<th>Percentage</th>
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<tr>
<td>Appointment Reminders</td>
<td>1%</td>
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<tr>
<td>Recare Reminders</td>
<td>5%</td>
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<tr>
<td>Dormant Patient Reactivation</td>
<td>14%</td>
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<tr>
<td>Birthday Greetings</td>
<td>25%</td>
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<tr>
<td>Holiday Greetings</td>
<td>36%</td>
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<tr>
<td>Post-Care Reminders</td>
<td>37%</td>
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<tr>
<td>Newsletters</td>
<td>43%</td>
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**WE DO THIS**

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<th>Service</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Appointment Reminders</td>
<td>99%</td>
</tr>
<tr>
<td>Recare Reminders</td>
<td>93%</td>
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<tr>
<td>Dormant Patient Reactivation</td>
<td>80%</td>
</tr>
<tr>
<td>Birthday Greetings</td>
<td>66%</td>
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<tr>
<td>Holiday Greetings</td>
<td>58%</td>
</tr>
<tr>
<td>Post-Care Reminders</td>
<td>55%</td>
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<tr>
<td>Newsletters</td>
<td>43%</td>
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**WE PLAN TO DO THIS**

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<th>Service</th>
<th>Percentage</th>
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In addition to traditional patient communications such as appointment reminders (98%) and recare reminders (93%), practices are deepening their customer engagement along more relationship pathways such as birthday greetings (70%), holiday greetings (59%) and serving-up highly informative newsletter content (45%). However, improvement here is still needed as evidenced by the number of respondents who still don’t engage in these activities. Practices would benefit greatly from a software platform such as PatientActivator® which would automate this function and enable staff to maintain high frequency touchpoints.

Increasing customer engagement has a pronounced effect on patient-practice trust and, over time, customer loyalty and practice advocacy. Experts such as Robin Gelburd, President of FAIR Health, Inc., a national independent, not-for-profit corporation whose mission is to bring transparency to health-care, further assert that “forthright communication is an often over-looked aspect of enhancing patient well-being and satisfaction.”

Relevant to the topic of patient communications is the area of dormant patient reactivation. In our 2014 study, it was shown to be one of the most neglected areas in dental practices. Not much has changed in two years. Once again identified as one of the most important business activities, dormant patient reactivation has been flagged as both an area that is getting less attention now than in 2014 and as one that merits more of the office manager’s time than it currently receives. The number of practices that don’t engage in this potentially lucrative area of relationship-mining remains unchanged from 2014 (5%).
Practice Marketing

We next asked dental office managers to rank in order of importance the top marketing activities they engage in on an ongoing basis. The results are quite telling when compared to the responses we received in 2014. Over the past two years, the marketing options of choice have expanded (e.g. the advent of video testimonials), subtly shifted, and in regards to printed yellow pages — fallen off of a cliff.

No surprise to our analysts that the practice website, the hub of all marketing generated activity, was ranked far-and-away the most important component of the entire marketing effort at 78%. Online reviews came in next at 71% followed by SEO at 64%. These percentages best illustrate the essential synergy that must exist between practice-created content and effective leveraging of online content to increase business awareness.
It must be noted that “Incentives for Word-of-Mouth Referrals” did rank as highly important (62%). And it ranked at 71% in the “We Use This” category of our succeeding question as a tool for the acquisition of new patients. Although this method has been regarded as effective in the past, practices should check local regulations to see if offering incentives for word-of-mouth referrals is approved in their state.

We then asked which marketing activities the practice is engaged in, specifically for new patient acquisition. Predictably, a practice website was the most widely used – with 92% of respondents reporting they currently have a website. This is consistent with previous study findings – and in fact, the most-used activities remained almost identical in ranking (with the one exception being “online reviews” pulling ahead of “social media”).

The four most-used marketing activities were all online approaches (e.g., websites, online reviews, social media and SEO). Furthermore, office managers revealed a keen intent to expand their online approaches in the areas of paid Google Search, SEO, social media and websites in the future. Additionally, nearly ¼ of practices added video testimonials to their action item lists and ¼ plan to use in the future.

One encouraging finding was how many practices are steadily increasing their interaction with Yelp. 56% of office managers revealed that their practice uses Yelp, and more plan to in the future. According to a recent survey, patients rank online reviews on sites like Yelp among the top 3 most influential factors when selecting a dentist (and they view reviews as more important than a dentist’s professional credentials).

We asked office managers whether the time spent on various marketing activities has increased, decreased or stayed the same compared to two years ago.
Next, we asked if respondents felt too much time, too little time or the correct time is being spent on these activities.

Office managers are understandably allocating their time based on the perceived importance of each activity. Because office managers are predominately tasked with many of the social media and online review functions, questions must arise as to the pragmatism of having one person wholly responsible for all these duties. Something can be said for the wisdom of shifting these areas to a dedicated marketing person as part of the practice team (interestingly, 5% of respondents in this survey have already made that move).

It was disheartening to find out that large segments of our respondents feel they are spending “too little” time on social media (42%), the practice website (36%) and search engine optimization (33%) particularly in light of the fact that these are some of the same areas our respondents deemed as “very important.”
We are pleased to report that video testimonials are high on the “plan to use in the future” to-do list. This is consistent with current content marketing strategies that suggest the use of video is becoming one of the most effective tools for engaging and converting prospective customers.

A consensus of office managers assert that “more time” should be devoted to online pursuits (e.g., social media, practice website, online reviews and video testimonials). These are both the top areas where time has been increased, and the top area where office managers desire to invest more time. Not surprising considering consumers’ widespread shift to digital media, the time allocated to and use of print ads, mailers, and outdoor advertising (bus benches, etc.) are in steep decline.
Social Media & Online Reviews

We delved deeper into the topics of social media and online reviews – both of which have been shown above to be garnering greater attention in a majority of dental offices.

First, we wanted to understand who in the practice is responsible for monitoring, posting and responding in these online spaces.

![Pie chart showing the distribution of responsibilities](chart.png)

The office manager is the most likely person in the practice to be responsible for both social media and online reviews. "Other front desk staff" was indicated in 16% of offices while "the dentist manages these tasks" in almost 13% of dental practices (a 13% decline from the previous survey). This was followed by "third-party services."

A perplexing response was that 10% of participants said "we don't do this" (i.e. participate in social media) – an inaction that can only result in lost insight that will have a considerable impact in this era where marketing driven data is so crucial.
Next, we wanted to know on which social media sites practices have established a prominent business profile. Without exception, Facebook took the lead in 87% of our survey respondents. This was followed by Google+ with 71% and Yelp with 57%.

Does your practice have a business profile page on any of the following sites?

Facebook 87%

Google+ 71%

Yelp 57%

Interestingly, more dental practices have a business profile on Yellowpages.com than on popular social media sites like LinkedIn, Twitter, Snapchat, Pinterest and Instagram – the fastest growing social media sites.
Requesting Online Reviews & Testimonials

Given the data we already know about dental office managers’ relative responsibility for social media postings and monitoring, it stands to reason that they would also be – in most cases – accountable for online review requests as well.

Inherent to the effective use of this data is the necessity of having access to advanced software tools that would help assist in the effective collection, analysis and dissemination of reviews, etc. from online directories, social media, and review sites like Yelp. When we asked offices managers whether they used any software tools to monitor their social media accounts and reputation, less than half (44%) said they did. While 21% said, “no but we plan to in the future,” a worrisome 36% said “no, and we don’t plan to.” These rather alarming statistics tell us that not only are the majority of offices in desperate need of the right tools to do a complete job of managing their social data; far too many are unconcerned about correcting this situation.

Do you use any software tools to request patient reviews?

- 66% YES, WE DO
- 18% NO, AND WE DON’T PLAN TO
- 15% NO, BUT WE PLAN TO
Practice Changes

We asked dental office managers to share with us their thoughts on what they consider the biggest and most far-reaching changes to the job over the last five years. Here’s what they told us:

• 21% focused on the explosion of social media

• 20% felt it was about a younger workforce with more expectations about “What’s in it for me?”

• 18% felt long-term practice success more contingent on team growth

• 9% commented on marketing requiring a more strategic planning component

• 8% centered on practice goals more driven by metrics and data analysis

• Nearly 10% of survey participants said “all of the above”

What do you think are the biggest changes in the role of the dental office manager over the past five years?

01 Appointment Reminders
02 Dormant Patient Reactivation
03 Staff Training
04 Marketing now requires strategic planning
05 Hitting practice goals requires more focused metrics and analysis
06 Trying to keep up with ever-changing government regulations
07 The economy requires us to offer additional services, which means more insurance challenges
08 Continuing education in areas outside of the clinical arena for all team members is becoming more important
Conclusion

In our 2014 survey, dental office managers told us that due to a variety of factors (e.g. automated communication technologies, increases in staffing, etc.) they felt well-positioned to effectively manage operations at their practice. Office managers had become increasingly sophisticated about prioritizing practice activities and reported having enough time to dedicate to the many tasks on their plate. All in all, it was an optimistic report.

Call it the calm before the storm.

Our new survey shows that cracks are starting to appear in the level of confidence office managers displayed two years ago. The focus on the Big 3 of practice growth (e.g. practice marketing, new patient acquisition and keeping the schedule full) has intensified. Growing numbers of office managers are expressing concern over the time needed – as well as is available – for staff training. In 2014, the full impact of emerging areas of responsibility like social media and online reviews was still unknown. Today, office managers recognize that these key components of their practice marketing strategy require significant time and attention.
We’re pleased to report there were areas of improvement since 2014 (e.g. offering online options for scheduling, dedicating time for same day appointments, implementing appointing best practices, etc.). Office managers are tackling many of their practice’s biggest scheduling issues head on. They’re taking a leadership role in adding highly effective video testimonials to their practice marketing and social media strategies. Recognizing the need for dedicating more time to practice marketing efforts is a great example of their ability to anticipate the next big challenge.

One area of concern that carried over from our 2014 survey is the lack of time dedicated to dormant patient reactivation. This potentially rewarding revenue opportunity registers top-of-mind with office managers but – in our estimation – gets short shrift simply because there are not enough hours in the day for it.

Overall, the office manager survey revealed that dental office managers and staff are aware of the challenges ahead with respect to practice marketing, new patient acquisition, appointing and training. Based upon past performance in addressing looming problems, we’re sure office managers will take steps to meet to address these concerns before they become issues.
About Futuredontics®

Futuredontics®, parent company of 1-800-DENTIST® and Patient Activator®, is the nation's leading provider of dental marketing services. Since 1986, the Los Angeles-based company has dedicated itself to developing powerful products that help dental practices thrive.

Recognized as dentistry's premier new patient leads program, the company’s flagship 1-800-DENTIST service has helped over 9 million dental patients nationwide connect with member dentists. Every day, thousands of patients get personally matched to dentists through their 24/7 call center or via 1800dentist.com.

PatientActivator – Futuredontics’ communications, social and online reputation solution – increases production and boosts the practice’s online presence with automated appointment confirmations and tools for marketing, social media, reviews and much more.

Futuredontics also offer an extensive library of dental marketing resources – including whitepapers, webinars and videos. With unlimited live customer support, dentistry’s best marketing products and North America’s largest dental referral website, Futuredontics is the proven way for dental practices to grow their patient base and increase production year after year.

For information about our suite of dental marketing products visit us at www.futuredontics.com

To get a FREE copy of any our additional resources, including whitepapers, videos, webinars and more, visit www.futuredontics.com/MoreResources.

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