

Just Say PLZ

Lighthouse Practice Management Group Inc.

Dental Expo

How Dentists Are Using Extended Tools with Their PMS
To Increase Their Efficiency, Effectiveness & Profits!

What is business as Usual?

We're in a financial crisis, highlighted by widespread foreclosures, bank failures, high unemployment, and a slump in manufacturing, which marked the end of the economic expansion.

What is business as Usual?

The Panic of 1819

Numbers to remember

1776 – Declared our independence

1787 – We became an operating Country

In 222 years, we've suffer from 4 major depressions, 16 major recessions, and 9 major wars totaling 156 years. That means that we've been in turmoil in the country 69.5% of the time.

Ironically, we go out of business during the good times, we just don't know it.

**Why PLZ is so important
The Typical Dental Practice**

**Beware of Time
Posteriority
I love Lucy**



Posteriority

- “There's only an hour in an hour and you can only do so many things **RIGHT** in that hour. When you add one more thing to what you can do **RIGHT**, something takes the rear.”
- **99% of all problems that occur in business.**
- Why **dental teams sabotage** new technologies, consultants, anything new!



Incorporate Practice Management Tools **PMX**

What is PMX?

- A software system that interacts with the existing practice management system and performs critical functions automatically
 - **Eliminates POSTERIORITY from the dental staff**

How Does PMX Work?

- Our software is synchronized with the practice management system every 10 minutes.
 - **Checks for activities**
 - **Uploads to server**
 - **Takes Action**

Why is PMX better the best choice?

- PLZ Practice Management Extended Software
 - Integrates
 - **Direct Mail Marketing**
 - **All types of Patient Communications**
 - **Practice Analysis Reporting**
 - **Remote Data Access**
 - Best value for price with one vendor
 - Plus we do it better

Direct Mail

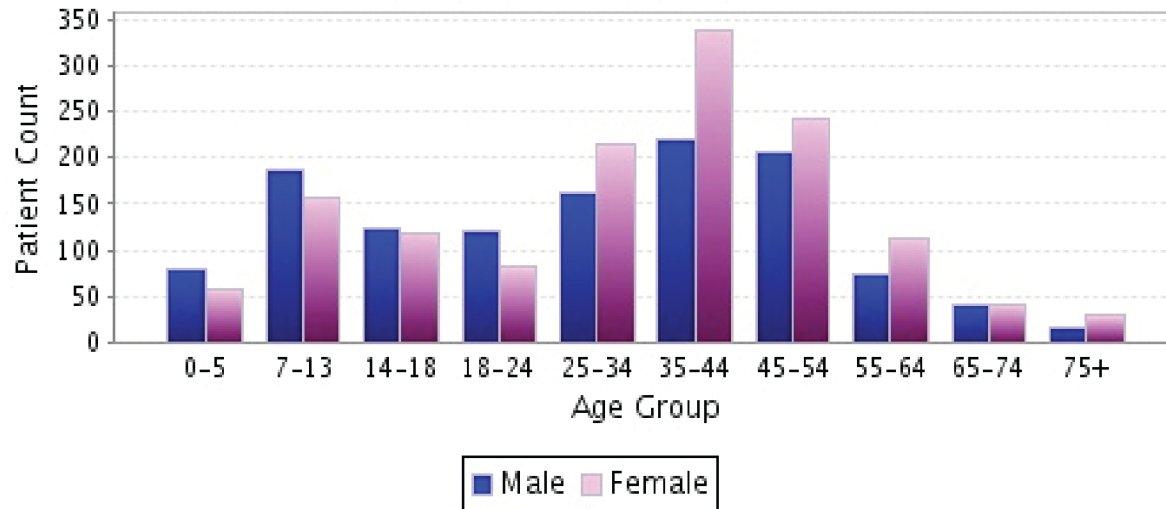
- Database analysis of the existing patient base via the Practice Management System.
 - Demographics
 - Geographics
 - Financial position
 - Appointments kept

Patient Data Marketing Report

Office: Maxwell T Powers, D.D.S

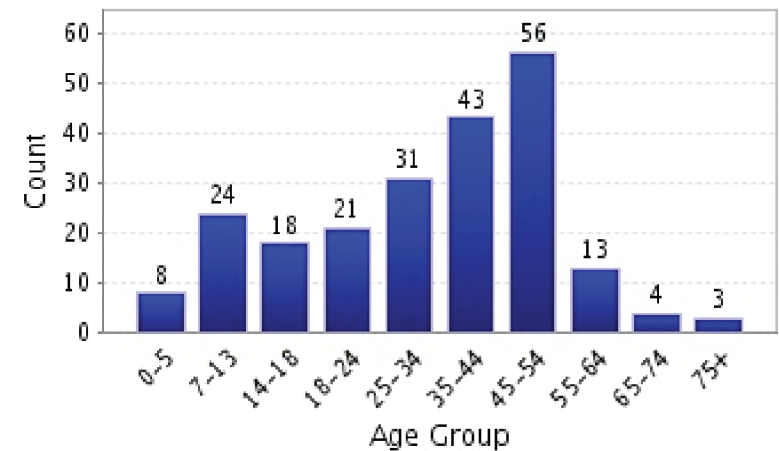
Active Patients by Age Group and Gender

Patients seen since 09-21-07

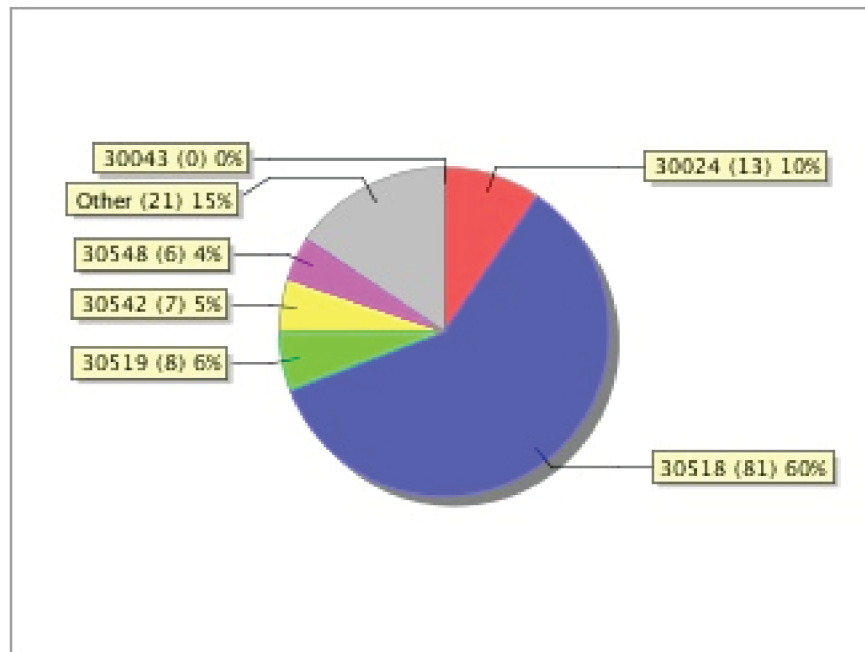


Appts Canceled by Age Group

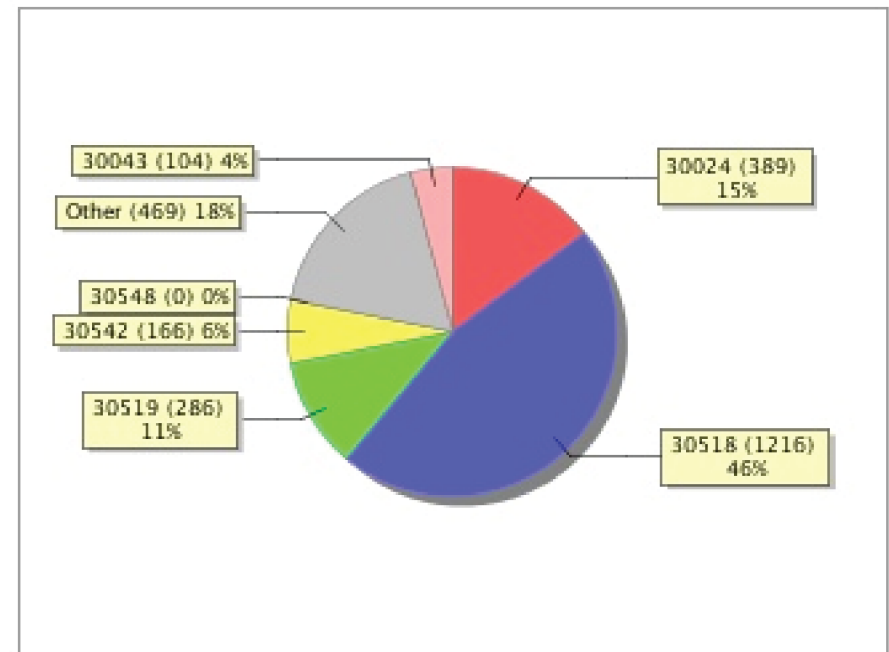
Recall and Non-Recall Appointments



Patient ZIP Codes



New (seen since 06-21-09)



Active (seen since 09-21-07)

PMX - Interactive Direct Mail

Why we're unique

- What are the unique selling points?
- Create the marketing piece
 - **Shell versus One-Up**
 - Multiple messages & images



PMX - Interactive Direct Mail

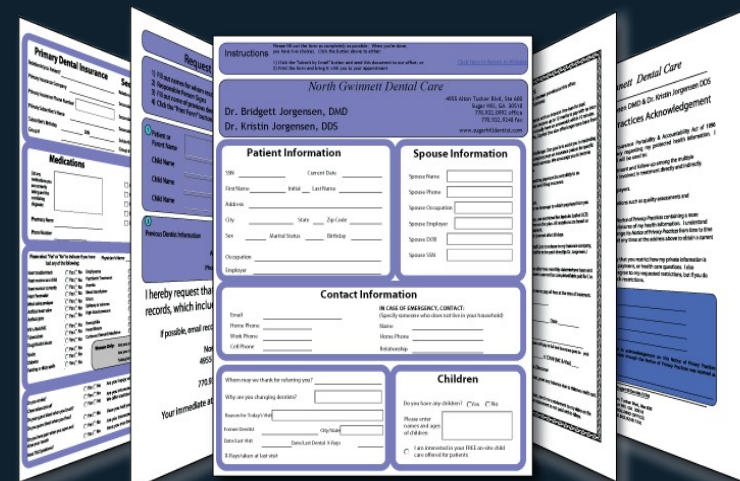
- **Create the Prospect List**
 - **Scrub**
- Develop Mailing Calendar
 - **Send**
- Track results
 - **Web site**
 - **Inbound Calls**
 - **New Patients Appointed**
 - **Scrub**



PMX – Automated Patient Communication

- **The New Patient**

- Track/record inbound call
- Update Appointment
- Save the Date
- New patient packet
- Medical/Dental Forms
- Audio/Video Links to Web Site



PMX – Automated Patient Communication

The New Patient

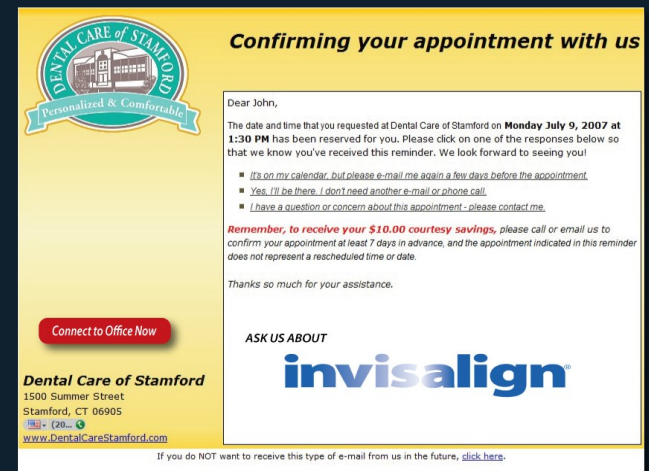
- Patient Survey
- Survey Tracking
- Track Recall
- Track Restorative
- Set up statistical tracking



A collection of dental forms. The main form is titled 'North Gwinnett Dental Care' and is for 'Dr. Bridgett Jorgensen, DMD' and 'Dr. Kristin Jorgensen, DDS'. It includes sections for 'Patient Information', 'Spouse Information', 'Contact Information', and 'Children'. There are also smaller forms for 'Primary Dental Insurance', 'Medications', and 'Dental Care Practices Acknowledgement'. The forms are arranged in a fan-like layout, showing different pages of the patient intake process.

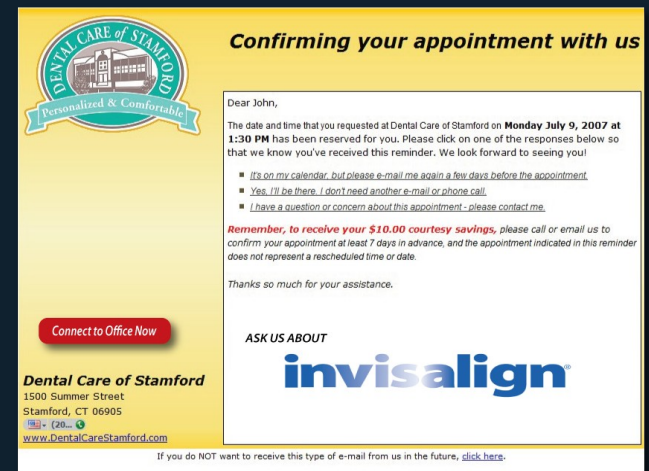
PMX — Automated Patient Communication

- **The Short-Term Appointment** (usually restorative)
- Appointment Made
- Save the Date email
 - **Confirm Directly to PMS**
 - **Request New Appointment**
 - **RealCall to Practice**
- Subsequent e-mail confirmation
- Automated Outbound Call (optional)
- Text Message Reminder



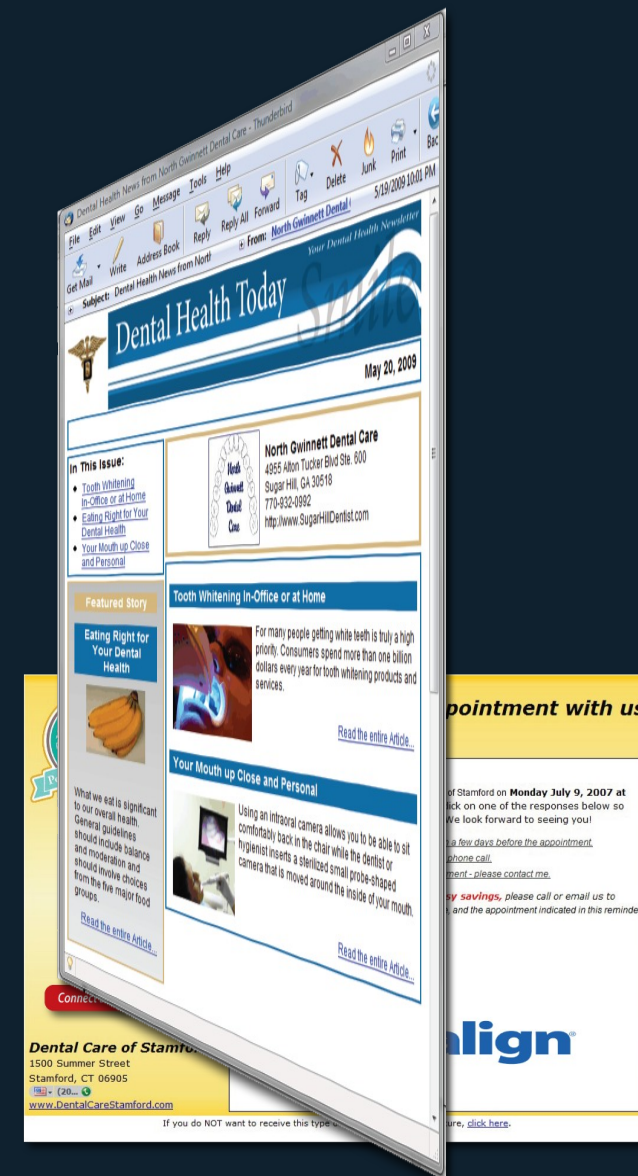
PMX – Automated Patient Communication

- **The Long-Term Appointment** (usually Recall)
- Appointment Made
- Save the Date email
- Sleep until 2 weeks 4 days
 - Send E-mail
 - Wait 4 days, send Postcard
 - RealCall tracks postcards
- Subsequent e-mail confirmation
- Automated Outbound Call (optional)
- Text Message Reminder



PMX — Automated Patient Communication

- **Recall Process (not appointed)**
 - **Specialized newsletter**
 - **Due Date email**
 - **Phone calls/letters/postcard**
- Track inbound calls
- Automated Outbound Call (optional)
- Appoint Recall Appointment
- No Appointment Set past due reminder



PMX – Automated Patient Communication

- **Recall Process (Past Due)**
- User Defined Schedule
 - **1 day, 1 month, 6 months, 12 year, 18 months**
- Track inbound calls
- Automated Outbound Call (optional)
- Appoint Recall Appointment
- No Appointment Set Reactivation Flag



The screenshot shows an email from Dental Care of Stamford. The header includes the office logo and the text "Confirming your appointment with us". The body of the email is addressed to "Dear John," and states that a date and time (Monday July 9, 2007 at 1:30 PM) has been reserved for the patient. It provides three options for the patient to respond: "It's on my calendar, but please e-mail me again a few days before the appointment.", "Yes, I'll be there, I don't need another e-mail or phone call.", and "I have a question or concern about this appointment - please contact me." A reminder is given to receive a \$10.00 courtesy savings by confirming the appointment at least 7 days in advance. A "Connect to Office Now" button is visible. The footer contains the office address (1500 Summer Street, Stamford, CT 06905), phone number ((203) 325-1111), and website (www.DentalCareStamford.com). The Invisalign logo is also present.

DENTAL CARE of STAMFORD
Personalized & Comfortable

Confirming your appointment with us

Dear John,

The date and time that you requested at Dental Care of Stamford on **Monday July 9, 2007 at 1:30 PM** has been reserved for you. Please click on one of the responses below so that we know you've received this reminder. We look forward to seeing you!

- [It's on my calendar, but please e-mail me again a few days before the appointment.](#)
- [Yes, I'll be there, I don't need another e-mail or phone call.](#)
- [I have a question or concern about this appointment - please contact me.](#)

Remember, to receive your \$10.00 courtesy savings, please call or email us to confirm your appointment at least 7 days in advance, and the appointment indicated in this reminder does not represent a rescheduled time or date.

Thanks so much for your assistance.

[Connect to Office Now](#)

Dental Care of Stamford
1500 Summer Street
Stamford, CT 06905
(203) 325-1111
www.DentalCareStamford.com

ASK US ABOUT
invisalign

If you do NOT want to receive this type of e-mail from us in the future, [click here.](#)

PMX — Automated Patient Communication

- **Reactivation Campaign**
- E-mail daily
- Dental Team reviews
- Automated Letter Sent
- PLZ Analyzes daily appointments
- No Appointment made
- Staff Action
- Statistics updated

Leading Edge Dental
16 The Strand
Penshurst, NSW 2222



NILAA GOSS
2112 ARCADIA STREET
PENSURST, NSW 2222

Dear Nada,

We haven't seen you for over 2 years, and we wonder if we should be concerned. A lot can happen in that time - in your life, and with your teeth and your smile.

We'd like to see you again, for a professional cleaning and examination, including an oral cancer screening. If you've experienced any kind of dental pain or other problems, it's important to know that these things rarely fix themselves, and that delaying treatment frequently results in more serious problems and increased cost of treatment.

If you haven't had any problems, great! There's nothing like a regular schedule of cleanings and other preventive care to keep it that way.

Please give us a call to set up an appointment. Or, if you've moved away or decided to go to another dentist, please let us know that, too - so we know we don't have to worry about you. You can call us at 9580 3047 or email us at denise@edgedent.com.au.

Sincerely,

A handwritten signature in black ink, appearing to read "Nilaa Goss", is written over a blue horizontal line.

Leading Edge Dental
9180 5555
www.edgedent.com.au

Leading Edge Dental - 16 The Strand - Penshurst, NSW 2222 - Ph:9180 5555

PMX — Automated Patient Communication

- **Practice Correspondence**
- **Loyalty Campaign**
- Practice Newsletter (**Can be customized by Jameson or us**)
- Specialty Newsletters
- Insurance Benefits Remaining Campaigns
- Birthday Greetings
- Happy Thanksgiving, Christmas or other selected cards or letters
- Specialized Actions — Jump Start Campaigns
- Special Appointment Activity (**cancel the day**)



PMX – Automated Communications

- Patient Surveys
 - New Patient
 - Hygiene
 - Restorative
 - Customizable by the practice
 - Feeds the Search Engines



Patient reviews for:

North Gwinnett Dental Care

4955 Alton Tucker Blvd Ste. 600

Sugar Hill, GA 30518

770-932-0992

"Bless you for taking Stefani in on such short notice!!!! We all appreciated it so much that care and time was taken to explain the diagnosis from Stefani's previc the doctor visit and thank you for everything! We also love the receptionist and the candies and beautiful office!!! Amen! - The Bradleys"

Anonymous

Aug 28, 2009

★★★★★ 5 stars

"Very personable staff. LOVE the childcare - life saver for stay at home moms with young kids."

Anonymous

Aug 11, 2009

★★★★★ 5 stars

"Thanks for the quick fix on my tooth. : -)"

Anonymous

Aug 3, 2009

★★★★★ 5 stars

"Thank you Dr. Kris for soothing my anxiety!"

Anonymous

Jul 24, 2009

★★★★★ 5 stars

"Awesome visit, recommend your office to anyone."

Anonymous

Jun 8, 2009

★★★★★ 5 stars

"Love this office. Great Staff and Dr Kris is awesome!!"

Anonymous

Sep 3, 2009

★★★★☆ 4 stars

"I truly appreciate you working with me as you are aware of my claustrophobia and put me at ease on all my visits. Sincerely, Edna Sloan"

Anonymous

Aug 12, 2009

★★★★★ 5 stars

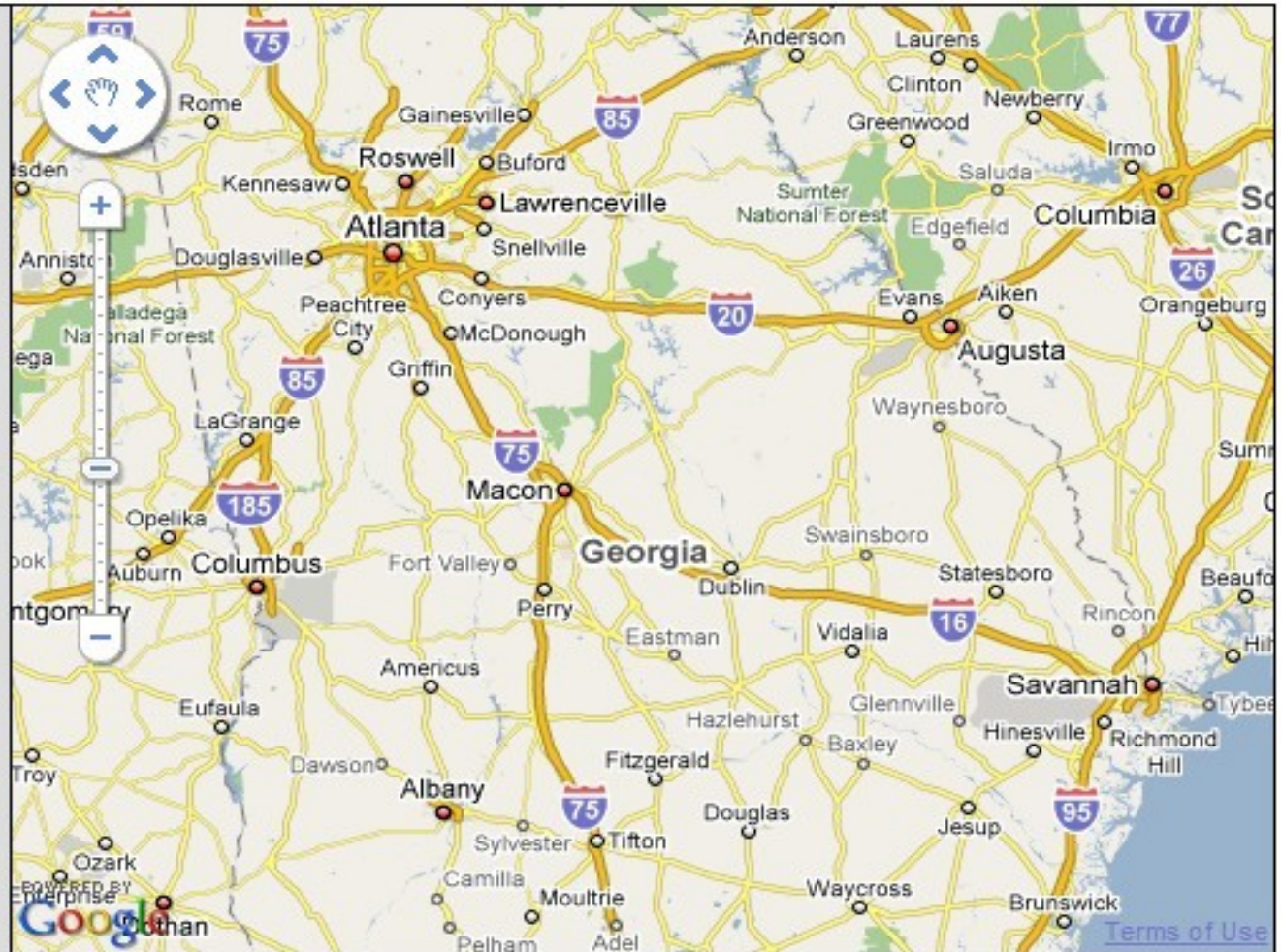
"My experience so far has been exceptional!!!!"

Anonymous



Dentists found in Georgia:

-  **Jeff Rodgers DMD PC**
Dunwoody, GA
[View Reviews](#)
-  **Lighthouse PMG**
Sugar Hill, GA
[View Reviews](#)
-  **Lighthouse PMG Practice**
Sugar Hill, GA
[View Reviews](#)
-  **North Gwinnett Dental Care**
Sugar Hill, GA
[View Reviews](#)



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Zoom!

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What Our Patients Are Saying...



Reviews from our patients

"Bless you for taking Stefani in on such short notice!!!! We all appreciated it so much that care and time was taken to explain the diagnosis from Stefani's previous visit as it helped the eased the situation tremendously when actually diagnosis was explained to grandparents.... We are very happy with the doctor visit and thank you for everything! We also love the receptionist and the candies and beautiful office!!! Amen! - The Bradleys"

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"Very personable staff. LOVE the childcare - life saver for stay at home moms with young kids."

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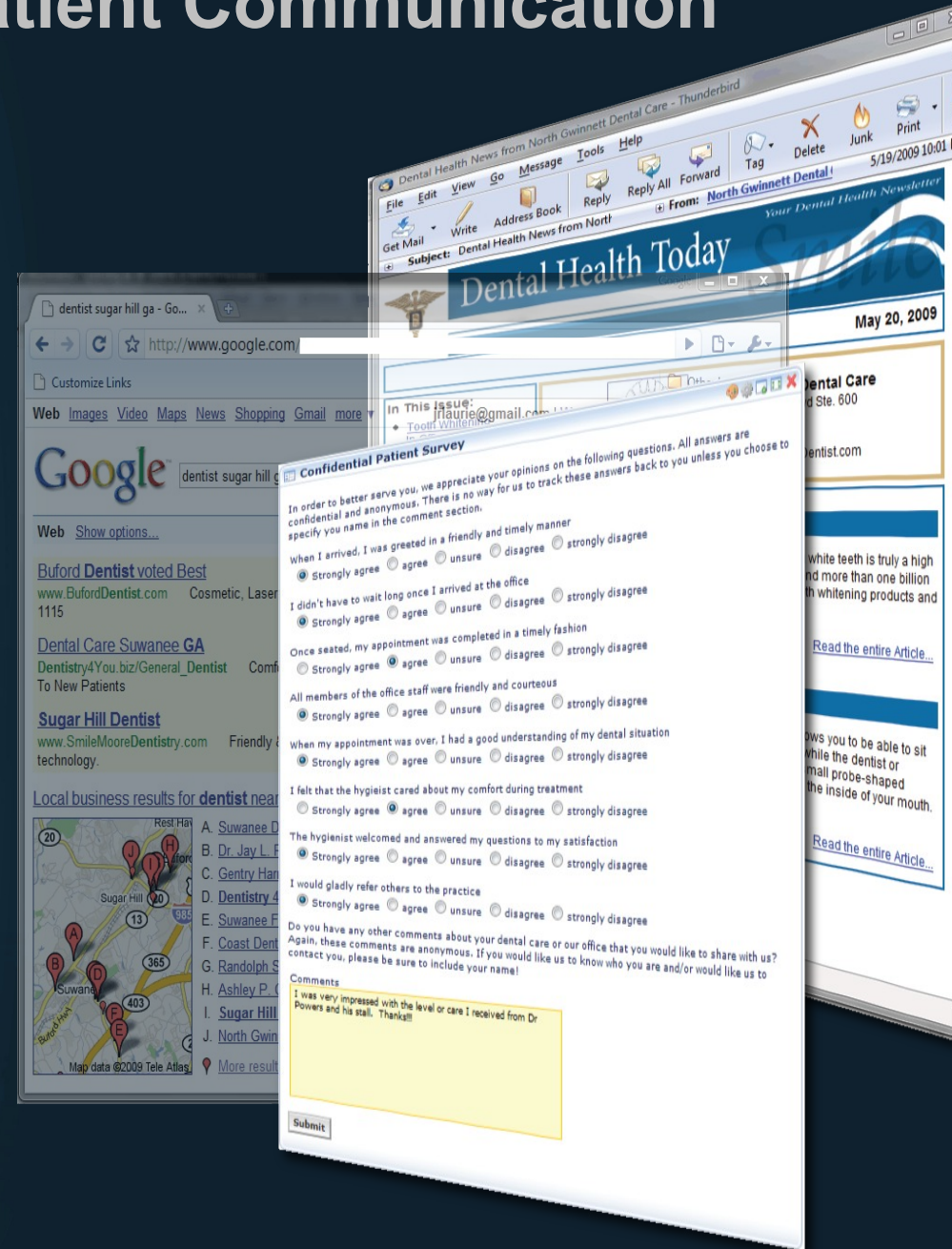
"Love this office. Great Staff and Dr Kris is awesome!!"

Anonymous

Aug 2, 2009

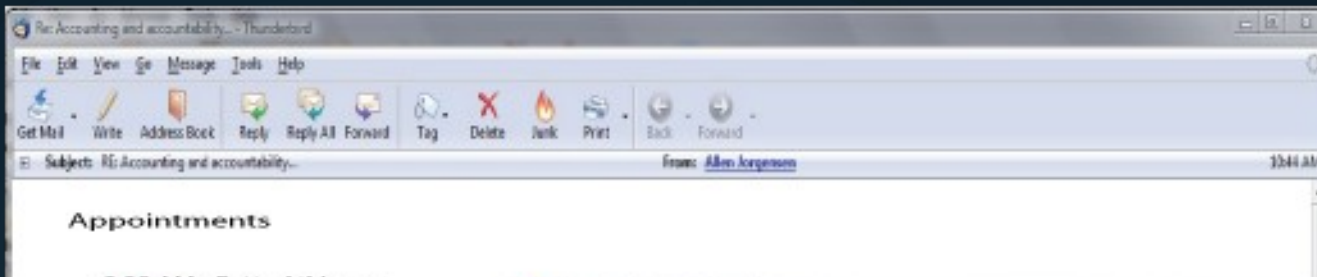
PMX – Automated Patient Communication

- **Other Activity**
 - Refer a Friend
 - Request an Appointment



PMX – Analysis Reporting

- Morning Huddle
 - **Things ToDo Today**
- End of Day
 - **Automated Accountability Reports**
 - **Things ToDo Tomorrow**
- Email Reports
 - **Analysis of overall practice**



Appointments

- 9:00 AM - Patty Atkinson
 - Missing cell phone number: (
 - Last recall: 2008-09-04 (0 month
 - Last visit: 2008-09-04 (0 month
- 10:30 AM - Edie Bennett
 - Missing cell phone number: (
 - Last recall: 2007-09-19 (11 month
 - Last visit: 2007-10-04 (11 month
- 10:45 AM - Matt Bennett
 - Missing cell phone number: (
 - Last recall: 2007-09-19 (11 month
 - Last visit: 2007-09-19 (11 month
- 11:30 AM - Eve Leverett
 - Missing cell phone number: (
 - Missing (or possibly invalid) er
 - Patient near birth date: Septer
 - Past due for recall (2008-04-24
 - Last recall: 2007-10-24 (10 month
 - Last visit: 2007-10-24 (10 month
- 12:00 PM - Cindy Oliver
 - Missing (or possibly invalid) er
 - Last recall: 2008-08-26 (0 month
 - Last visit: 2008-08-26 (0 month
- 12:30 PM - Nancy Marcum
 - Missing cell phone number: (
 - Patient near birth date: Septer
 - Last recall: 2008-09-04 (0 month
 - Last visit: 2008-09-04 (0 month

Legend

- This task is YOUR responsibility
- This task is someone else's resp
- This is for your information on

PLZ Automated Accountability Maxwell T. Power, D.D.S
 Office Manager 2190 Trent Steel Parkway Suite 10
 February 17, 2009 Hardcastle, ND 21784

Appointment Tasks							
Hygienist	Assigned Tasks			New Tasks			
	Task	Done	Inc. (*)	N/A	Done	Inc. (*)	N/A
	"On Recall" Verification	1	0	0	0	0	0

Front Desk						
Task	Assigned Tasks			New Tasks		
	Done	Inc. (*)	N/A	Done	Inc. (*)	N/A
Cell Phone Check	6	6	1	0	0	0
Ida Badley*						
James Angle*						
Sonia Wittel*						
Patricia Wood*						
Fred Massey*						
Sam Brown*						
Email Check	3	5	0	0	0	0
Ida Badley*						
Sonia Wittel*						
Yaneli Martinez*						
Christine Milling*						
Jordan Akins*						
Home Phone Check	1	0	0	0	0	0
Birth Date Check	3	0	0	0	0	0
Recall Past Due (No Appt)	1	0	0	0	0	0
Family Member RCA Past Due	1	0	0	0	0	0
Home Address Check	2	0	0	0	0	0

----- Original Message -----

Subject: Lighthouse PLZ is working for you! (Weekly Summary)

From: Lighthouse PLZ <mailer-beta@lighthouseplz.com>

Date: Sun, September 20, 2009 12:32 am

To: Array

Dear North Gwinnett Dental Care,

During the past week, we sent the following messages on your behalf:

- * Automated Telephone Calls: 8
- * Cellular Text Messages: 15
- * Letters: 7
- * Postcards: 61
- * Rich Text Emails: 283
- * Self Mailers: 55
- * Super Size Postcards: 340

Current Office Status:

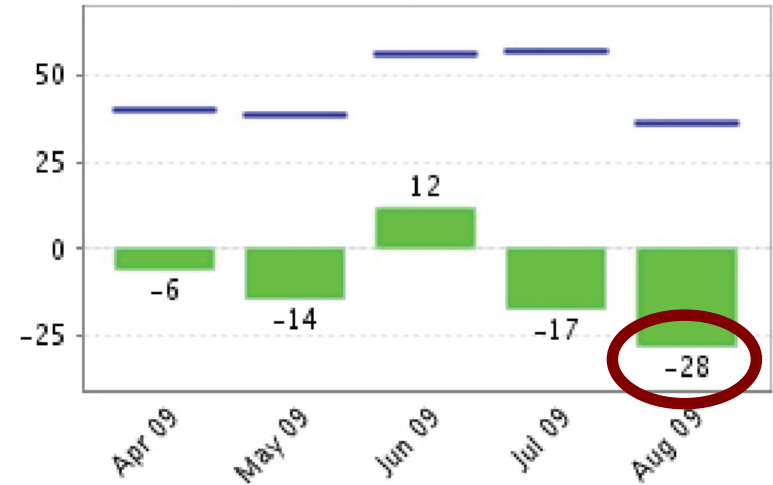
- * Active Patients: 2,630
 - o With Email: 1,845 (71%)
 - o With Cell: 959 (37%)

Patient Data Analysis Report

Office: Maxwell T Powers, D.D.S

Active patients (seen since 09-21-07):	2,624
Active patients on recall:	1,941 (74%)
New patients (first visit since 06-21-09):	134
Recall Appointments Currently Scheduled:	622
Recall Patients with No Appointments Scheduled:	1,644

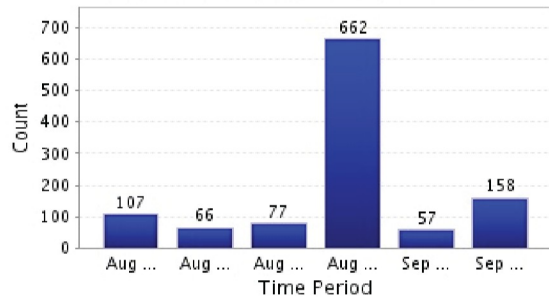
Net Patients Gain or Loss



■ New Patients ■ Net Gain

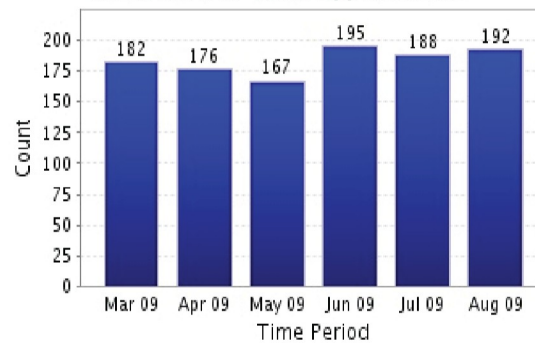
Appointments Scheduled

Recall and Non-Recall Appointments



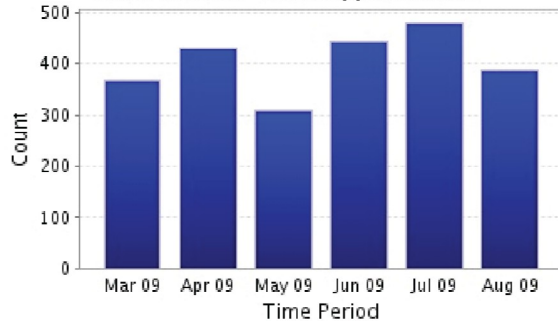
Appointments Canceled

Recall and Non-Recall Appointments



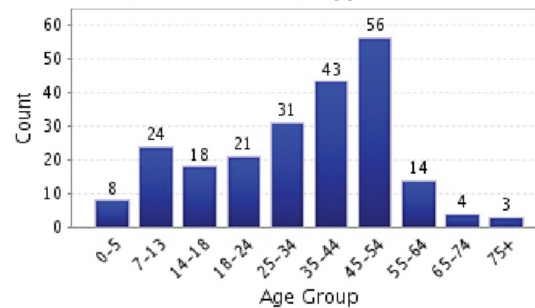
Appointments Completed

Recall and Non-Recall Appointments

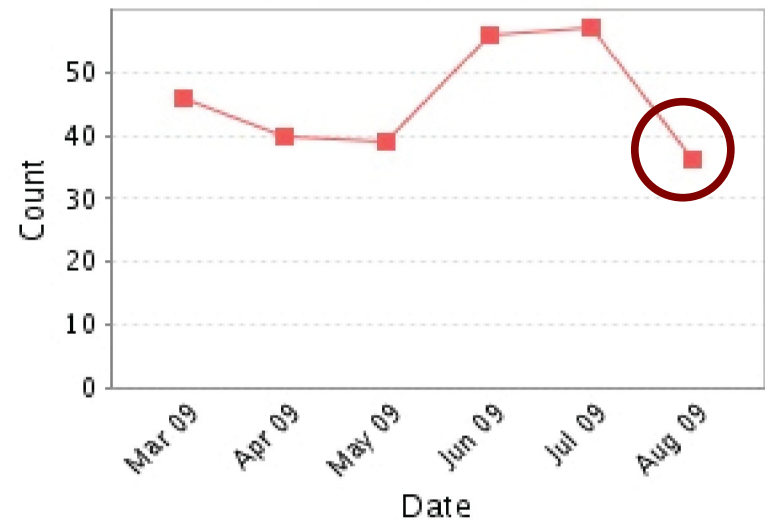


Appts Canceled by Age Group

Recall and Non-Recall Appointments



New Patients

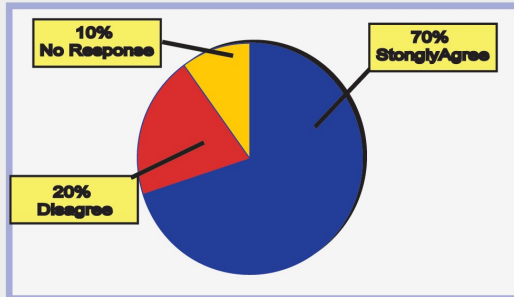


Max Powers, D.D.S.

HOME APPT CALL LISTS MESSAGES MANAGE CONTENT TOOLS SIGN OUT

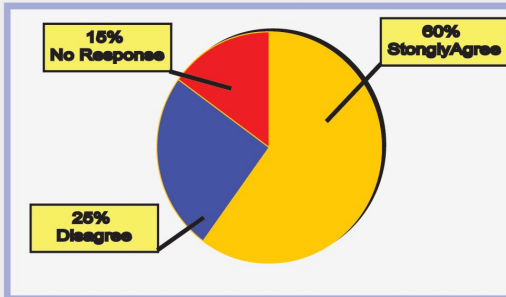
Dr. visits last 90 days

Overall, I am quite satisfied with the care I received at the practice



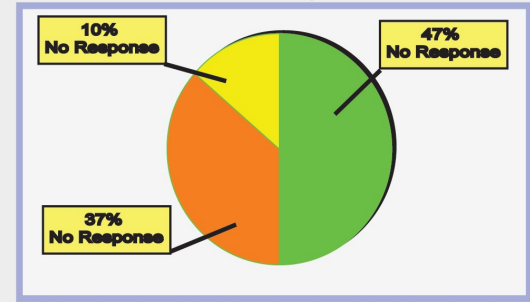
Hygiene visits last 90 days

Overall, I am quite satisfied with the care I received at the practice

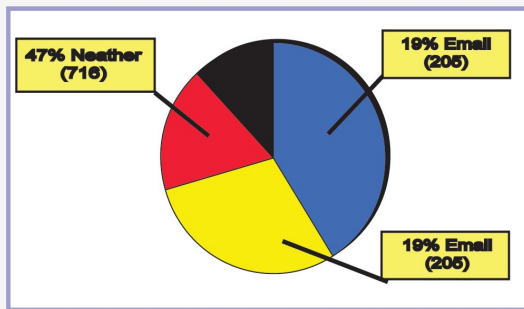


New patient visits last 90 days

Overall, I am quite satisfied with the care I received at the practice

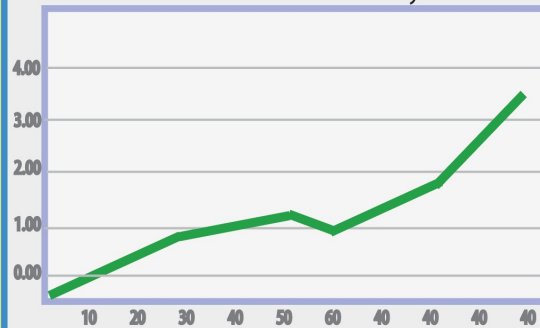


Data Collection



New Patients

New Patients last 90 days



Messages Sent (MTD)

	Successful	Unsuccessful
Postcards	364	18
Text Messages	74	4
Emails	95	21
TOTAL	533	43
DELIVERY RATE:		99%

PLZ EXTENDED DATA ACCESS

iPhone Appointment App

Your practice management software on-the-go...



Use an iPhone or iPod Touch to see an up-to-date copy of your appointment book and make post-op and confirmation calls on-the-go. Use the iPhone app in your office as an electronic routing slip and receive updates on patients without looking at your computer. This innovative feature of PLZ gives you the information you need whenever you need it no matter where you are!