

Episode 9: Heartland Dental Builds a Foundation of Innovation

KATIE LORENC: Thanks for joining us on the *Call Box Dialed In* podcast. I'm Katie Lorenc, Senior Account Consultant at Call Box. Here with me today I have Todd McKnight, Regional Director of Operations, and Michelle Ameen, Regional Manager of Operations, who are both part of the Heartland Dental organization. Thanks so much for joining me today!

TODD MCKNIGHT: Happy to be here!

MICHELLE AMEEN: Thank you!

KATIE: Well to start us off, I would love to hear from each of you a little about your backgrounds and how you got into your current roles at Heartland. Todd do you want to start us off?

TODD: Sure, so I started off with a business background, marketing degree, then I started at the front desk. I was a BA answering phones and making schedules.

KATIE: I did not know that. Here in Oklahoma?

TODD: In Oklahoma, yes. Started in a private practice and went into a DSO answering phones. I was with a DSO and within a few months, I was managing the office and then I became a special projects guy. The owner would have me do special projects and challenges and that developed into my role now. So I went from a Regional Manager to an RDO.

KATIE: So you've done it all, good deal. What about you, Michelle?

MICHELLE: Actually I have a different background. I have a Bachelor's in Psychology, which I still use everyday in some sort of fashion. But I really was interested in – it was at the time called a Practice Administrator position – and I was doing that in the orthopedic field doing durable medical equipment and I came across an ad for Heartland describing the same kind of role, but it sounded so much more intriguing and fun and outgoing. So I thought why not? I gave it a shot and they took a chance on someone with a psychology and orthopedic background and now I'm 4 years in dentistry and I couldn't be happier.

KATIE: That's awesome. So to your point, Michelle, the roles at Heartland – the titles might sound similar to other organizations or dental practices, but we know they're pretty different at Heartland. Can you tell me about the Regional Manager role and what that looks like for you?

MICHELLE: You wear many hats and it is never the same on a day-to-day basis; we'll never have monotony, I will be honest with that. It's a high-level support, not just for the doctors, but for your Practice Managers of Operations, you support the Regional Support Admin, your RDO – which is Todd, our Regional Director. It's just a full 360 approach where you're training, constantly supporting, growing, developing everyone around you to best support your patients. It's all hands on deck.

KATIE: That's awesome. How often are you actually in the practices?

MICHELLE: It just depends on the need. Typically we do quarterly thrive meetings. I like to do them the first month of every quarter, and I visit the offices probably three times a piece a month for more in-depth conversations, but there are going to be those impromptu visits that are necessary.

KATIE: Right, absolutely. I think saying “many hats” is probably a huge understatement for what you guys actually do. What about you, Todd? As the Director, what does that look in comparison to the Regional Manager, where does it change?

TODD: Yeah, so I spend most of my time... I tell everyone I’m in the doctor business. It’s my job to make sure the doctors are happy. That is where we partner; that is why I have a team with Michelle and others to make sure we’re fulfilling the needs of the doctors – handling the operations, training, and coaching of the teams to help them focus on dentistry. So I would say no day is the same. I wish I could get to offices more, but most of my time is spent in meetings and phone calls, making sure the doctors feel supported.

KATIE: Yeah, absolutely. You’ve seen a lot of growth with Heartland over the years as well. What has helped sustain some of that growth and what have you seen as some of the biggest changes?

TODD: In my mind, I think the biggest thing is abundance thinking. Always making sure you’re thinking of the big picture, the next level. Never being satisfied with where we’re at and being willing to adapt and change. As long as we’re comfortable with that, then we’re going to continue to have growth and to me growth is fun, it’s exciting. I don’t like to sit still and do the same thing, so the challenge of growth is wonderful, and at Heartland I have that great opportunity because we’re continuing to grow and develop all the time.

KATIE: That’s awesome. With some of that growth, I’m sure there have been some growing pains as well. Can you speak a little bit to some of the challenges you guys have overcome?

TODD: Sure. I think in any organization, the biggest challenge of growth is infrastructure. Making sure you have all the right people in the right place trained well to do their jobs. About three years ago, we went through and had a huge growth phase. We ended up promoting 15-20 Practice Managers, and so that was a big challenge to get them all up to speed and trained. It really reminded us that you have to have a bench; you’ve always got to be developing your people so that when growth comes, you’re ready and prepared for it.

MICHELLE: I agree. I absolutely agree with that.

KATIE: What are some of the things, Michelle, that you’ve done to make sure your team is really growing and developing?

MICHELLE: Honest to God truth is overcommunication. Every day, whether it’s a phone call or text message, email, we are constantly staying in communication. That allows me to help support them on a level they need. Some of them may not need that often communication; some of them just like to have conversation, “Hey how are you doing?” maybe on a non-business-related topic. But it always ends up being about the office at the end of the day.

KATIE: Give us some of your life hacks. How do you keep up with all of the organization of this and do you have any apps or tools?

MICHELLE: My Apple iPhone calendar. Some people have paper calendars, I do have one of those as well. But without my reminders, my Apple iPhone calendar, having those things absolutely sets me up for success. It doesn’t let anything slide; I don’t forget anything.

KATIE: I just got to witness some of the calendar time that your team had today; I’m overwhelmed just from having sat in it for 10 minutes, so that’s awesome. Todd, I know you’re a big proponent of implementing new technology, obviously you’ve piloted some stuff for Call Box recently, but I’ve heard the rumor at

Heartland is you're never shy to do that across the board. Can you talk about some of the developments that you've been able to use from a technology standpoint?

TODD: To be accurate, we do a lot of testing in our county in Oklahoma.

KATIE: You guys are the guinea pigs for sure.

TODD: Yeah, what got you here won't get you to the next phase. We want to try new things and develop things and always try new items. If you're looking from a technology standpoint, our newest implementation would probably be scanners across the board; looking at getting those implemented into practices and taking on that as a challenge. But I think underlying all of it is you can implement and do a lot of change if you have a solid infrastructure in place and solid systems in place. So the fundamentals are there, and then you can fine tune as you need to. So change comes from needing the invention, that's where new inventions come from, so we're willing when we have struggles to think outside the box and try new things. I'm able to do that because I have a strong team that I trust and put a lot of trust into.

KATIE: So with your team, how do you achieve that buy-in? When you run into friction, what do you do to make sure everybody gets on the same page?

TODD: I actually had that conversation today with the team. At every admin meeting we have, I leave exhausted and worn out, but that's because of the way we process and my philosophy is that everybody has a voice. We're all in the seats we're in because of our skills and what we bring – we all have value. So I believe that as we have discussions, we all need to voice our opinions, have the debate, everyone can talk about it, and then when we leave the room we have one voice. So we come to a term in here – we might argue about it and have discussions, we might be really tired from it, but when we leave, we're all going to be on the same page and have buy-in. If you don't have a chance to voice your opinion, you're not going to have that buy-in. I want everyone to voice their opinion, share their thoughts, and then we can move on.

KATIE: Sure, absolutely.

MICHELLE: He's definitely always given us the freedom to lead in our own way. So, thank you, Todd.

KATIE: And then taking it from the regional level to the practice, Michelle, how are you carrying out those new projects or new technology that you're bringing to your teams?

MICHELLE: It is the same exact way; it's just on a different level. Todd has the RMOs (Regional Managers of Operations), and so I have my Practice Managers of Operations – that's seven wonderful PMOs, so it's the same thing. I can roll out something, get their feedback, and just work through those thoughts – their feedback – and bounce ideas off of each other. They do have more buy-in, just like Todd was saying. But also I have to have believability in what I'm saying; they will see right through it if I don't. It's just really good conversation and having that passion and believability so they actually know it's genuine. They have their feedback and we come up with a plan.

KATIE: That's awesome. It's so helpful too I think to have that united front that you are talking about from the regional level. So when Practice Managers – because we know they're all talking to each other too – so as they're talking to each other, they can all agree that everybody is on the same page. I think that's huge. Switching gears here just a little bit, Heartland obviously uses Call Box's solutions to gain insight into patient calls. Can you guys share with me some of the best practices you've seen? Where have you seen this be successful and how are your offices using this today?

MICHELLE: With my offices, it's a really big deal for us to utilize this tool because it's remarkable if it's used correctly. So we have this awesome tool – Call Box – so our PMOs will sit down at least once a month (twice a month would be ideal) with their business assistants, so the forefront of the office that are answering the phones; they go over the results, go over the calls. I mean we're talking about in front of everybody. So

Suzy Q. could be listening to Sandra Doe and be like, "Oh my gosh, I sound like that? I could've done that better." You game plan together, you strategize together. How could we have done that better? And so once a month, my teams do that.

KATIE: They're actually listening to the audio files then?

MICHELLE: Correct.

KATIE: I always think in the beginning that's so cringeworthy, but over time you get kind of used to it. Have you seen your office adapt to that a little bit?

MICHELLE: Oh yeah! Nobody wants to hear their voice, but if they make one mistake and it's heard out loud, boy they change it the next time. Also the reporting is really nice too to see where we're falling on the connect, the booking, and all of that. It's just really good information to share because we're very competitive and so we want to be the best of the best.

KATIE: Yeah absolutely. I mean it's the dream team!

TODD: I'm a firm believer that people will do the best they can with the knowledge they have. People are trying to do their best. What I like about Call Box is it brings in information and data and puts it in a way that we can use it. It makes us aware of things we didn't even know, like when is our phone being answered and when is it not. We can now say these are the times we need to be better. It just brings to light things that we can now discuss and do better because we know better.

KATIE: Sure, that's so huge. What would you say, Todd, from an analytics perspective? Is there a data point that jumps out to you or has really caused change?

TODD: It seems so strange saying out loud, but it's so simple to think that all you have to do is ask. That's the data point where I'm looking at it thinking, "How many times do we answer the phone and answer a question, but we just don't even ask if they want an appointment?" That really stood out to me when we first started this process. It seems so simple, but we missed it.

KATIE: It does. Yeah, we always say what gets measured, gets managed. So the second we started bringing that to your office's attention, it changed drastically. I was just talking to Northwest OKC today and they were saying, "We want to keep request and invite at 100%." It's their number one goal to make sure they're asking on every call, where before they didn't even know to think about that. Giving you guys a minute to brag about a practice or a specific process – is there a practice that comes to mind that has been really quick to adopt this and improved processes and/or revenue, which may be the bigger goal?

TODD: Michelle won't say it, but we should brag on Michelle because her region has taken this on and excelled. They have phenomenally excelled and taken it on and made it a project. I think it's through the awareness that Michelle created with the program and made it aware to everybody that they can do it and they needed to do it and it was expected. But who within that group, Michelle, would you say?

MICHELLE: The results have been varying, which is great because I used to have one consistent office, but now I want to say 360 Dental had 100% connection rate or it could've been Southern Woods Dental. I don't remember which one it was, but I like to put them up against each other. They know this; it's no secret. "Are you going to let so-and-so beat you on this? You can't do that! You guys had the best connection rate last month. What happened?"

KATIE: I always joke at Call Box, but I think the Heartland PMOs and RMOs are some of the most competitive people I've ever met; they all want to be the best. I think my first meeting with you guys, Todd, you were up against another RDO. There was some contest going on even outside of anything Call Box is doing, just Heartland at large. I think that speaks a lot to your management style and what motivates your people.

So what do you guys find, maybe Michelle this is a good question for you, but what do you find that really motivates your PMOs? Obviously the idea to win, but is there some kind of prize or Heartland swag that you give away to motivate?

MICHELLE: I mean bragging rights are great; we all like that ability to carry that verbal trophy, but results speak for themselves. They work hard and they want to attain those goals and those benchmarks. We also like to give away some Heartland swag or lunch, or maybe a little gift card or buying lunch for the team. Sometimes they may offer a gift card for that PMO and they say, "You know what? Can we just get lunch for the team instead?" I love that response! It's really cool that they want to share the success with the office that created it, not just the PMO.

KATIE: It adds to the mentality that it really is everybody in the office working together towards this and not just one individual that's gonna carry that. That's huge.

TODD: The one that shocked me is that everyone seems to love "Fill the Fridge." So that's going to work towards filling the fridge. So if they hit a benchmark, then the RMO will take them out and buy all the supplies like food and drinks to stock their fridge, so then they have snacks and stuff all throughout the week.

KATIE: Oh my gosh, I love that.

TODD: In fact, I just saw in this office there's a list by the coffee maker that shows the things they want when they fill the fridge next time.

KATIE: I love that. Ok, I hope that... is my COO listening to this? Patrick, we want to do "Fill the Fridge" at Call Box too. That's awesome.

MICHELLE: It's motivating.

KATIE: Yeah for sure, food is surprisingly motivating. One thing that I've also been impressed with Heartland is the passion behind educational opportunities. We've touched a little bit on staff training, but I would love to hear more from you guys. How do you create these educational opportunities and how you're carrying them out to your practices? Todd do you want to start with that?

TODD: That's one of the things I'm most proud of and one of the things I love and value most when I joined Heartland was that they truly not just support and push education and CE for doctors and hygienists, but for the team. At all levels, they're all about growth and development and having a leadership pathway for everybody. So I love it, I think we do a lot of... nowadays we're moving to homeroom, where we do a lot of video calls that are interactive; a lot of Bluejeans calls are interactive in training. And then soft skill coaching, where we still get together and they have a classroom full of 20-30 people training and coaching and take those skills they learned in homeroom and apply them in real-world scenarios.

KATIE: So are those things that you, as the RDO, are building for them? Or is it more Heartland at large?

TODD: So that's more Heartland at large; we have it set up for the whole company. We have our individual coaching opportunities about once a month, once every other month, when we get our team together to start coaching, counseling, and trying to develop.

KATIE: Ok, and what would you say is the focus of these educational opportunities – is it job-specific, life-specific? How do they format all of this, or is it everything?

TODD: It's a little bit of everything! So depending on the role, there's going to be some very technical pieces. For BA, there's going to be very technical pieces on how do I input a new patient, how do I schedule, best day scheduling, all of that. And then there's going to be aspects that are leadership. How do I improve my communication? How do I develop myself? So it's been a gamut of all of it.

MICHELLE: We definitely like to see our team members with all of those great things he's mentioning.

KATIE: And how do you guys measure success or progress within that?

MICHELLE: There's a lot of different ways. The way to measure, in my opinion, would be how well is the office functioning. Honestly, at the end of the day, they either know their role or they don't. If people are committing to their personal growth and they want to have the success for their personal development, it's gonna show in their office results. I just think strength in numbers. Think about if every team member were to be that hungry for growth, I mean, the accountability and results would just be astronomical; it would be huge.

KATIE: Yeah, absolutely. Are those classes taught by you guys? Are they led by fellow PMOs? Who sets those up?

TODD: Good mix of all. So we have a team that builds the videos and teaches the videos, we have RMOs and RDOs who signed up to teach courses in classes, even the PMOs teach certain classes of the regions as well. So it's all of us contributing in; we're all learning and growing and teaching each other at the same time.

KATIE: That's incredible. Again, it builds so much of that teamwork that you guys need across the board, not just within an individual office, but within your region and within Heartland as a whole. And (correct me if I'm wrong) but it sounds like it creates more consistency too across the Heartland brand, so that's got to be really important for you guys too.

TODD: Absolutely.

KATIE: Cool. Well obviously 2019, we're halfway over which I can't believe. But it's been a really big year for Heartland in terms of growth already and new developments, but I'm sure you guys have some upcoming goals as well. Can you talk to me for a little bit about what your goals are for the rest of this year and even into next?

MICHELLE: I don't even know where to begin with that. I don't know if we have enough time for all of that, oh my gosh. Just like any goal, we want to be not just better than we were yesterday, but we want to do better than what we did this time the year prior. So we're always going against ourselves. We're not competing against other DSOs; we're competing against ourselves. So if we can gain momentum in doing those things and hitting our budgets and hitting revenue goals better than we did the last time, then we're growing. We're constantly wanting to grow every month and every year.

TODD: And of course this time of year is recruiting season, so we have a lot of onboarding doctors; I think we have about 12 starting in the next six weeks-ish.

KATIE: Wow, 12 just within your region?

TODD: Just our region. So that's going to be a major focus from now through the end of the year to help these new grads come in, get onboarded, get trained, and feel comfortable and supported so they can take their skills they learned in school and apply them to real life.

KATIE: Sure, well every time you add a new doctor it impacts everything, right? You need more office staff, you need more marketing, you need to fill schedules; that makes the whole world a little crazier. That's really exciting though. Those are really the questions I wanted to ask you guys today. I really appreciate you guys taking the time to chat with me and to let us interview you. We're always looking for new ways to learn what's going on in the dental industry as a whole and obviously Heartland is a huge leader in that. So really appreciate your time!

MICHELLE: Thank you very much!

TODD: Yeah, thank you!