2017 Oregon Dental Conference®
Course Handout

Cindy Ishimoto, CDPMA
Course 8112: “Foundations of Leadership: Leading from Where You Are”
Thursday, April 6
9 am - 4:30 pm
Foundations of Leadership
Leading from where YOU are!

Cindy Ishimoto

Oregon Dental Conference ~
Oregon Dental Executives Association
Thursday April 6, 2017

Educational Objectives:
At the conclusion of this course, attendees will be able to:
1. Define the difference between leadership and management
2. Utilize the problem solving model within the practice
3. Develop as a self-directed leader
4. Improve communications with all leadership styles on the team
5. Improve teamwork through appreciating the different generations on the team

Leadership is the process of directing the behavior of others toward the accomplishment of some common objectives.
Leadership is influencing people to get things done to a standard and quality above their norm. And doing it willingly.

Brian O’Nail

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
MYTHS ABOUT LEADERSHIP

- Leaders are born
- A leader must have certain, defined qualities
- Leaders in one situation must be leaders in other situations
- Leadership can only be developed by experience
- Leadership is not a popularity contest

Leadership is a place of being,
Management is something you move in and out of

The Manager
1. Administers
2. Is a copy
3. Maintains
4. Focuses on systems and structure
5. Relies on control
6. Has a short-range view
7. Asks how and when
8. Eye always on the bottom line
9. Imitates
10. Accepts the status quo
11. The classic good soldier
12. Does things right

The Leader
1. Innovates
2. Is an original
3. Develops
4. Focuses on People
5. Inspires Trust
6. Has a long-range perspective
7. Asks What and Why
8. Eye is on the Horizon
9. Originates
10. Challenges the status quo
11. Is their own person
12. Does the right thing

Characteristics of Leadership

- Loyalty-to the mission/vision, patients, and practice goals.
- Enthusiasm-for dentistry and life!
- Attitude-always consistently positive.
- Diversity-accept the differences in team members and patients' personalities, age, work ethic, and culture.
- Enjoyment-in daily tasks and life in general.
- Respect, Responsibility, Rewards, Recognition-
- Stick-to-it-iveness-consistency.
- Health-we can't sell health if we don't have it.
- Integrity-ability to walk the talk, live the rules.
- Priorities-knowing the daily priorities is essential to team cohesiveness and being a great self-directed leader.

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Self Directed Leadership

Self-leaders are still true leaders even if they have no known followers. True leaders inspire by the influence of their characters and general self-made brands. Leadership is defined by the virtues of one's behavior.

What do good leaders do?

*Empower the people on the team, cast vision, letting people know the plan*

Benefits of good leadership:
Goal accomplishment, harmony, decreased stress and chaos, increased productivity, sense of fulfillment

Costs of bad leadership:
Chaos, stress, turn over, demotivation, loss of passion and patients suffer

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
### Vision Consideration

*In my mind’s eye—the vision of my ideal practice looks like this:*

<table>
<thead>
<tr>
<th>Type of treatment being provided by doctor and hygienist</th>
</tr>
</thead>
<tbody>
<tr>
<td>My ideal patient visit</td>
</tr>
<tr>
<td>My qualities, characteristics, and attitudes</td>
</tr>
<tr>
<td>Business, Clinical, Hygiene, Lab</td>
</tr>
<tr>
<td>The culture I want within my practice</td>
</tr>
<tr>
<td>My technology and tools</td>
</tr>
<tr>
<td>My number of days serving patients, hours, vacations, holidays</td>
</tr>
<tr>
<td>Amount of production, collections, take home salary</td>
</tr>
<tr>
<td>Reputation in the community</td>
</tr>
</tbody>
</table>

**Purpose:** To improve the health and lives of our patients, our team members, and our community.

**Vision:** My vision is to grow the practice over the next three years into one that:

1. Is known in the community as a Complete Health dental team who understands the oral systemic connection and advocates for patients overall health as well as their dental health.
2. Has a reputation for providing outstanding, uncompromised quality of dental care delivered with five-star patient service.
3. Performs 30% cosmetic, 50% restorative, surgical and implant, and 20% Sedation services on primarily adult patients.
4. Easily produces practice goals that attain a minimum of a 40% profit ratio each year.
5. Is able to afford to update skills of doctor and team members annually by attending top-notch continuing education courses, focusing not only on clinical skills, but also communication and teambuilding/leadership skills.
6. Retains highly-skilled, caring team members, who are compensated at the top of their field for the area in terms of pay benefits and incentives.
7. Employs team members that go beyond expectations for each other and for patients, take full responsibility for their contributions, skill level, attitude, and becoming the best they can be in their positions.
8. Has a patient base that values our services and respects our time.
9. Operates within a facility which is high-tech, immaculately clean, relaxing, and comfortable for patients and team members.
10. Has seamless systems so that the practice runs efficiently and cohesively.
11. Is a happy, fulfilling, fun, and low-stress environment in which to work.
12. Contributes each year to our community in a significant way.
13. Exceeds the expectation of the patient it serves and the team members it employs. Creating a feeling in our community that there is no better place to have dentistry done and no better place to work than this practice.

### Vision Consideration

*Now ask yourself HOW do I make this happen*

What’s getting in my way?
What will I do to overcome my own barriers/obstacles?
Who do I need in my life to help me?
Who do I need as a resource person or company
What do I need to do to overcome my own resistance

Cindy Ishimoto, CDPMA  
www.cindyishimoto.com *  
cindy@cindyishimoto.com
Write the Goal

Design a Plan of Action

Assign Responsibilities

Time Activate

Evaluate

REACHING GOALS: A 5-STEP PROCESS

GOAL ACCOMPLISHMENT SHEET

GOAL ACCOMPLISHMENT SHEET

Benjamin Franklin said: watch the little things, a small leak will sink a great ship.

In order for any business to succeed, it must first become a system so that the business functions exactly the same way every time down to the last detail.

Organize around business functions, not people. Build systems within each business function. Let systems run the business and people run the systems.

People come and go but the systems remain constant.

94% of all failure is a result of the system... not people. Systems are the essential building blocks of every successful business.

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Patient Dissatisfaction Is Usually The Result Of A Breakdown In Established Business Systems.

Each patient contact is a moment of truth, a time when the relationship can be won or lost. Patients’ do business with practices that consistently meet their expectations—deliver explicitly on their promises. Effective systems ensure that nothing is left to chance and that patients get what they want and expect every time.

Effective business systems make expectations clear to employees, improve job satisfaction, and reduce turnover. They also reduce training requirements and supervision. Good systems increase productivity, quality, safety and cleanliness. They produce a motivated workforce. Systems maximize the use of time, the most precious of resources.

It’s the little things that make the big things possible. Only close attention to the fine details of any operation (systems) makes the operation first class.

Repetition Is The Key To Learning

Every patient every time

Organizations can be categorized into 4 levels of development:

- Chaos: No systems
- Organization: Developing systems
- Management: Team is managing systems
- Entrepreneurial: Leadership at all levels

Where are you in your journey?
MORNING HUDDLE

The purpose of this meeting is to achieve open lines of communications between the administrative and clinical staff, preparing for the exceptions of the day. It will help you to serve your patients at the very highest level. Must have an agenda and a facilitator

Yesterday’s production:
Today’s scheduled production.
Tomorrow’s scheduled production.
Announce voids in the schedule.
Emergency Time Available
New patients
Financial concerns
Next Available Primary Appt and Hyg. Appt
Chart review – clinical team protocol.
Necessary Images: radiographs IOC etc
Last date of continuous care
Incomplete treatment
Closing the meeting

Team Meeting

Rotate Facilitation & Recorder
Review of the old business
Review statistical health: practice #’s
Management concerns – Calendars
Begin agenda
Education Time
System review time
Next Meeting Details
End the meeting on a positive note

7 Steps to Problem Solving

1. Define the problem - be aware of needs. Define the problem according to those needs
2. BRAINSTORM possible solutions
   
   **Ground Rules for Brainstorming**
   
   A. Think short and long term planning (needs, goals etc.)
   B. Postpone solution thinking or action orientation, listen without judgment (we tried before)
   C. No idea is a bad idea it is AN idea
   D. Be Creative
   E. Take Risks
   F. No criticism allowed

3. Discuss the various solutions offered and prioritize.
4. Reach an agreement on the option(s) of choice.
5. Design a plan of action! (Use a goal worksheet or project sheet)
6. Implement that plan.
7. Evaluate the results.

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Checking Your Financial System

- Accounts receivable should be ½ of your average month’s production.
- Too high and you may not be collecting over the counter, not following up on past due accounts, providing treatment without financial arrangements etc.
- Less than ½ a month; usually means you are a cash basis practice or it might also indicate tight policies, which may chase away many patients from reaching for want based dentistry.

Checking Your Financial System

The 90 days or longer column of your Accounts Receivable (AR) should be no higher than 3-4% of the goal of ½ months average production.

Many computer programs age out to 120-day & 180 days past due - add the columns to the > 90 days column total and divide by the total AR to get your past due percentage.

Checking Your Financial System

Insurance Claims Aging: Over 90 days should only be 1-2% of the total AR that is 3-5% past due

With computerized printing and electronic claims all claims should be filed the day of service.

Insurance Co.’s pay within 21 days on paper claims and within 14 days on electronic claims.

To have insurance money 90-days past due indicates a weak follow up system.
### Checking Your Financial System

**Healthy collection percentage** 98%

Dependent on your insurance posting

Adjustments or write-off’s should be: less than 1-2% of your production.

Divide the collections by the monthly production to get the collection percentage.

---

### Continuing Care Success

<table>
<thead>
<tr>
<th># Of Active Patient Records</th>
<th>1800</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiply by 2 (avg. visits per year) Total # of Patient Visits Available per year</td>
<td>3600</td>
</tr>
<tr>
<td>Divide Total by 12 Average # of pt. visits available p/month</td>
<td>3600 ÷ 12 = 300</td>
</tr>
<tr>
<td>Divide by # of hygiene days per month available in your practice. Equals number of visits available daily.</td>
<td>300 ÷ 16 days = 18.75</td>
</tr>
</tbody>
</table>

What about new patients, PMT patients who come every 3-4 months etc.? Prophy percent 60% Perio percent 40%

---

### Lost Time Is It Killing Your Productivity?

Doctors should be losing no more than 1-2 hours per month.

1 full time hygienist 2-4 hours per months
2 full time hygienists 6-8 hours per month.

---

Cindy Ishimoto, CDPMA  
www.cindyishimoto.com *  
cindy@cindyishimoto.com
Lost Time – What are the COST$?
Example of 1 year’s lost time in a practice

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost Minutes</td>
<td>14,264.00</td>
</tr>
<tr>
<td>Lost Hours</td>
<td>248.67</td>
</tr>
<tr>
<td>Lost Days</td>
<td>31.08</td>
</tr>
<tr>
<td>Avg Daily Production</td>
<td>$3,030.50</td>
</tr>
<tr>
<td>Lost Production</td>
<td>$92,178.23</td>
</tr>
<tr>
<td>Avg monthly lost production</td>
<td>$7,681.52</td>
</tr>
</tbody>
</table>

Track to find the hard cost loses!

Count up hours that should have been scheduled.
(example 16 days 8 hrs. to be scheduled for pts. would be 128 total hrs.)

Count up the lost hours. (example 16)

Subtract the two, =’s actual hrs. producing. (112 hrs.)

Divide production by the actual # of hours producing; =’s hourly production. (If produced $75,000 divided by 112 hrs. the hourly production would be $669.64)

Multiply hourly production by the number of lost hours; =’s your lost production! ($669.64 times 16 lost hours is a production loss of $10,714.29)

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Lost Time ~ Prevention

Value and Urgency
Give patient’s the reason to keep their appt.

Mrs. Smith it is important you come for your next appointment because:

I look forward to seeing you at your next appointment.

Lost Time ~ Prevention

Confirming should you?

Give appt card: Mrs. Smith, this card is a confirmation of your appointment, most our patients find this works for them, will this be enough for you or would you prefer for us to verify your appointment by text or email?

Recommendation: utilize a Patient Contact automated service
Favorite: Lighthouse http://www.lh360.com/
Second Favorite Solution Reach (formerly known as Smile Reminders http://www.solutionreach.com/

Lost Time Follow Up System

Develop your protocol:
To charge or not to?
Send letters every time.
Keep a priority call list
Dismiss chronic problem patients.

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
SOP For Broken Appointments

1st failure/last minute cancellation-slap on the wrist letter.

2nd failure/last minute cancellation-inform the pt. You are placing them on the priority call list & will call when you have an opening. Try to schedule them 2 times off of that list. If unsuccessful tell them you are going to give them a place of honor on doctor’s schedule and that it is imperative that they keep this reserved time.

3rd failure/last minute cancellation-back to the priority list and can only have appts last minute. Or dismissal from the practice

---

Baby Boomers
Or the Me Generation
- 1945 → 1961
- Age: 56-72

Generation X
Xers
- 1962 → 1976
- Age: 41-55

Generation Y
Millennials Or the “Net” generation
- 1977 → 2000
- Age: 17-40

---

Some Of The Negative Traits And Workplace Attributes Widely Discussed

Boomers – Self-centered with sense of entitlement, workaholics, self-motivated, don’t appreciate feedback.

Gen Xers – Lazy, skeptical and cynical, question authority figures, desire for a work-life balance and flexible schedule, work dress is at low end of business casual.

Millennials – Lack basic literacy fundamentals, very short attention spans, not loyal to organization, demand immediate feedback and recognition, integrate technology into the workplace, expect to have many employers and multiple careers, work dress is whatever feels comfortable

---

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Baby boomers (1945-1961 age: 56-72)
This massive group grew up in a time when “anything goes.”
Competitive, prosperous and passionate.
Also known as the “me” generation: parents wanted them to have a better life than their own.
They believe in challenging the status quo and changing the world
Boomers loyalty is centered on how you make them feel.
They don’t want to be a stranger and value rapport, trust and the need to feel understood
Understand “where they’re coming from.” Not just regarding the conversation at hand, but the history and perspective they offer.

Baby Boomers (1945-1961 Age: 56-72)
Attributes And Core Values
- Ability to handle a crisis ambitious
- Anti-establishment, challenge authority
- Competent, competitive, consensus leadership, multi-taskers
- Consumerism
- Ethical
- Good communication skills and question everything
- Idealism
- Live to work personal gratification and personal growth
- Loyal to careers and employers most educated as compared to other generations
- Now seek a healthy life/work balance youthful orientation
- Optimistic and team oriented
- Political correctness strong work ethic want to “make a difference”
- Willing to take on responsibility
- Spend now, worry later money management

Baby Boomer (1945-1961 Age: 56-72)
On The Job
**Assets**
- Service-oriented
- Driven
- Willing to “go the extra mile”
- Good at relationships
- Want to please
- Good team players

**Liabilities**
- Not naturally “budget minded”
- Uncomfortable with conflict
- Reluctant to go against peers
- May put process ahead of result
- Defensive in the face of feedback
- Judgmental of those who see things differently
- Self centered
THE BOOMER—
WHAT THE OTHER GENERATIONS SAY ABOUT THEM


MILLENNIALS SAY: THEY ARE GOOD MENTORS AND ROLE MODELS, THEY SHOULD LIGHTEN UP, I WISH THEY WOULD TAKE THE TIME TO ANSWER MY QUESTIONS.

---


• Gen Xers are characterized by their independence and need for flexibility rather than stability. They love challenges, have no fear, but don’t bore them.
• Have a “make me believe” attitude and don’t want to repeat the same mistakes of their parents prefer to think of parents as friends rather than role models.
• Most cynical, pessimistic, unhappy, and unfriendly generation of the generations: (latch key kids-loners)
• See themselves as “realists” GET REAL is a commonly heard phrase from them
• Cautious and conservative, wary of experts

---

Gen Xers Attributes And Core Values (1962-1976 Age: 41-55)

- Adaptable
- Ignore leadership - independent - unimpressed with authority
- Can change, think globally and are suspicious of boomer values
- Crave independence they are self reliant LIKE INFORMALITY
- TECHNO literacy
- Seek fun
- Confident competent flexible, highly educated and have high job expectations
- Ethical focus on results
- High degree of brand loyalty
- Lack of organizational loyalty
- Pampered by their parents
- Pragmatic/practical
- Results driven self-starters self sufficient
- Skeptical of institutions and cynical strong sense of entitlement
- Willing to take on responsibility willing to put in the extra time to get a job done

work/life balance work to live not live to work

---

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Gen Xers – On The Job
(1962-1976 Age: 41-55)

Assets
- Adaptability
- Techno-literacy
- Independence
- Creativity
- Willingness to buck the system

Liabilities
- Skeptical
- Impatient
- Distrustful of authority
- Inept at office politics
- Less attracted to leadership

---

How they differ from the boomers

Boomers
- Fight against authority
- Workaholics
- Political at work

Xers
- Ask forgiveness rather than ask permission
- Work toward goals and objectives, not just putting in time.
- Practice politics wastes time we could be finishing the work and getting our of here.

---

What The Other Generations Say About Them

Boomers say: they’re slackers, they’re aloof, they lack social skills, they are always doing things their own way, instead of the proscribed way (our way)

Millennials say: cheer up, they should explain their process better, they never let us all chip in and work on things together, they send me assignments via email, I hardly ever look at my email, they don’t have a very optimistic view of the future.

---

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Gen-Y Millennials 1977-2000
Age: 17-40

- The Y generation is defined by the high speed, connected world of today. The internet is their favorite place to play, work and form relationships.
- They are optimists in their loyalty but realists with their service expectations.
- Recognize individuality & uniqueness: (the generation that was awarded for showing up) have been given lots of awards perhaps few true accomplishments.
- Recognize their strong social desires.
- 300 million + out of work worldwide.
- Responsible for lots of debt: personal and national.
- Remain highly optimistic. Still holding on to their dreams, don’t rain on their parade and don’t take goals away.

Gen-y Millennials Attributes & Core Values
1977-2000 Age: 17-40

- Ambitious: not entirely focused. Look to the workplace for direction & to help them achieve their goals.
- At ease in teams - loyal to peers - open to new ideas – optimistic - want fun.
- Attached to their gadgets techno savvy have not lived without computers ----- high speed stimulus junkies ----- focus on change using technology.
- Well educated - confident - high morals highly tolerant and holy competitive.
- Friendly ---- lead scheduled, structured lives individualistic yet group sociable like personal attention.
- Diversity focused - multiculturalism ---- globalization (global way of thinking).
- Fiercely independent - self - absorbed - strong sense of entitlement -
- Incorporate individual responsibilities into their jobs. Innovative think out of box seek responsibility early on in their roles. Have a sense of and do their civic duty.
- Hope to make life contributions to world globally focused very patriotic (shaped by 9/11).

Gen-Y Millennials On The Job
1977-2000 Age: 17-40

<table>
<thead>
<tr>
<th>Assets</th>
<th>Liabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collective action</td>
<td>Need for supervision and structure</td>
</tr>
<tr>
<td>Optimism</td>
<td>Demand for constant feedback</td>
</tr>
<tr>
<td>Tenacity</td>
<td>Have helicopter parents</td>
</tr>
<tr>
<td>Heroic spirit</td>
<td>Family events trumps work</td>
</tr>
<tr>
<td>Multitasking capabilities</td>
<td></td>
</tr>
<tr>
<td>Technologically savvy</td>
<td></td>
</tr>
<tr>
<td>Adept at change</td>
<td></td>
</tr>
</tbody>
</table>
Gen-y Millennials The Current Available Workforce
The Work Environment That Engages Them

- Ease and speed
- Can be customized
- Competent, trustworthy leaders
- **Weekly, even daily feedback**
- Open flow of information

Gen-y Millennials
What The Other Generations Say About Them

Boomers say:  *they’re tethered to their cell phones, they’re inexperienced, can they set up my Facebook page for me?*

Gen Xers say: *they’re unrealistic, here we go again, another generation of spoiled brats.*

Establish Standards & Expectations

**Interpreted differently by each generation**

Work Hours, Patient Service Hours (lunch, staff meetings in lunch?)
Educational / Training opportunities (outside of work hours)
(Boomers work on, Xers get “their job done” and Gen Y is family, fun and civic duty focused)

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
The question I began with was:
Does your practice already have texting rules in place? Email rules? Do you expect personal calls?
Cell phone “location” and use guidelines documented?
Dress code set the standard: entering into discussion will cause dissention, this is the touchiest of sticking points between the generations.

Boomers will wear the uniform. Xers prefer casual but won’t fight uniforms. Gen Y prefers to pick their own. Gen Y’s response is what’s the big deal over a dress code as long as I can choose my own style?

---

Establish Standards & Expectations

**Policies**

<table>
<thead>
<tr>
<th>Boomers</th>
<th>Xers</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Let’s create a policy or procedure so everything runs smoothly and is fair for everyone.”</td>
<td>“Rules are made to be broken.”</td>
<td>“If it doesn’t make sense, I’ll assume it’s a guideline.”</td>
</tr>
<tr>
<td>Boomers pushed for new laws, enforced equality so the country could realize the promises of democracy.</td>
<td>Gen Xers realized that life can’t be managed with rules or policies, and one size doesn’t fit all.</td>
<td>Millennials feel comfortable questioning policies and see them as guidelines rather than rules. If they don’t buy the reason for them, they use policies as an invitation for an argument.</td>
</tr>
</tbody>
</table>

---

**Communications**

<table>
<thead>
<tr>
<th>Boomers</th>
<th>Xers</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diplomatic in person, speak open-direct style. Use body language to communicate. Present Options (flexibility) face-to-face. Answer questions thoroughly and expect to be pressed for details. Avoid Manipulative/controlling language. Like the personal touch from managers. Get consensus, include them or they may get offended. Establish a friendly rapport. OK to use first names. Learn what is important to them. Emphasize the company’s vision and mission and how they can fit in.</td>
<td>Polite: Use positive, respectful, motivational, they prefer electronic communications. Communicate in person if the message is very important. Don’t talk down, they will resent it.</td>
<td>Be careful about the words you use and the way you say them; they are not good at personal communication and will not care about the facts.</td>
</tr>
<tr>
<td>Share/Defer Immediate. Use straight talk, present facts. Learn their language &amp; speak in their preferred communication style. Talk in short sound bytes. Share info immediately and often. Has the potential to bridge the generation gap between youngest and oldest workers. Don’t return messages. Use direct, straightforward approach. Avoid buzz words and company jargon. Tie your message to “results.” Emphasize “WHAT” is in their area of training and skills to build their resume.</td>
<td>Polite: Use positive, respectful, motivational. They prefer electronic communications and electronic feedback. Communicate in person if the message is very important.</td>
<td>Determinate your goals and aspirations and to message them. Prefer to learn in networks, teams using multi-media while being entertained and excited.</td>
</tr>
</tbody>
</table>
Feedback and rewards

<table>
<thead>
<tr>
<th>Boomer</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Title recognition</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
<tr>
<td>Feel rewarded by money and will often display all awards, certificates and letters of appreciation for public view.</td>
<td>Like praise.</td>
</tr>
</tbody>
</table>

Meetings

<table>
<thead>
<tr>
<th>Boomer</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meetings were how we get information and they created opportunities for everyone.</td>
<td>Meetings are okay, but don't bore me.</td>
</tr>
<tr>
<td>Boomer pushed for more meetings to create equal opportunities for all.</td>
<td>Make it interactive or I may interrupt.</td>
</tr>
<tr>
<td>Meetings are how they keep the team together and get critical work done.</td>
<td>If they text in the meeting or bring up something not on the agenda, they feel the are not being rude.</td>
</tr>
<tr>
<td>Meetings were how we get information and they created opportunities for everyone.</td>
<td>Meetings are okay, but don't bore me.</td>
</tr>
<tr>
<td>If meetings are not relevant and do not keep moving they will multitask.</td>
<td>Make it interactive or I may interrupt.</td>
</tr>
<tr>
<td>Meetings were how we get information and they created opportunities for everyone.</td>
<td>If they text in the meeting or bring up something not on the agenda, they feel the are not being rude.</td>
</tr>
<tr>
<td>Meetings were how we get information and they created opportunities for everyone.</td>
<td>Meetings are okay, but don't bore me.</td>
</tr>
</tbody>
</table>

Training

<table>
<thead>
<tr>
<th>Boomer</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training is a reward.</td>
<td>&quot;Who would work for a practice that didn't provide training?&quot;</td>
</tr>
<tr>
<td>For high-potential boomers, ongoing training was a reward. They were accustomed to lecture and memorization, so they could pull the useful parts out of ineffective training.</td>
<td>Millennials know that other parts of the world have higher educational standards and knowledge is doubling rapidly, so practices that cut learning in tough times are too dangerous to work fast.</td>
</tr>
<tr>
<td>Training is a reward.</td>
<td>&quot;Who would work for a practice that didn't provide training?&quot;</td>
</tr>
<tr>
<td>Training is a reward.</td>
<td>&quot;Who would work for a practice that didn't provide training?&quot;</td>
</tr>
<tr>
<td>Training is a reward.</td>
<td>&quot;Who would work for a practice that didn't provide training?&quot;</td>
</tr>
</tbody>
</table>

Cindy Ishimoto, CDPMA
www.cindyishimoto.com  *cindy@cindyishimoto.com
As patients, boomers loyalty is centered about how you make them feel. They don't want to be a stranger and value rapport, trust and the need to feel understood. They are more interested in the dental experience and the relationship they have than the actual quality of the "product". When they do focus on treatment they will want to know why yours is better than the rest. They will see themselves as your customer and will be looking for all the things that relate to exceptional customer service. In their eyes you will only be as good as your "last at bat" and they will change dentists easily until they find one that treats them as if they were the most important person in their day – a slight exaggeration but for sure they need to be pampered. According to the ADA, in 1993, the height of baby boomerism found that 68% of patients sought out a change of dentist because they were treated with indifference. The "me" generation does not like to be treated with indifference, get to know them and involve them in their own dental conditions.

As a patient accepting treatment, boomers communication involves taking the time to provide an experience as opposed to an appointment. They want to be able to express their unique preferences and be heard with empathetic listening and want to feel that have their best interests at heart. They respond well to deep interviewing of their goals, vision and the perception that you understand their dental objectives. They need to feel you are treating them as a person not just their disease state.

### Boomer As Patients

- Baby boomers won't just do what they are told by the dentist and often ask multiple team members what their opinion is. They want to be shown why they should spend their money with you and why your recommended treatment is better than any other options and yes they want to know what the options are. They are great co-diagnosticians in fact they demand to be part of the exam process as its completed and are much more apt to say yes when they see the treatment as a solution to a problem they own, not what you found.
- The boomers are key candidates to be exited to a treatment coordinator in a consult room for more in depth discussions outside of clinical area.
- Boomers say yes to services they want
- Boomers will spend money because they were raised in a time of economic prosperity. They live on credit, interest charges and monthly payments.

### Key points for boomers

- What you do for them or offer them "should" save them time. Be clear on how that is done. Working with you makes difficult tasks and decisions easy.
- Caution: be very careful of too much technology as the solution. Used a funny cell phone with a dial on it, they have current Technology all figured out for them by grandchildren.
- Selling to boomers: show your work: visible work ethic: listen: hear: before seeking to be hard. Understand "where they're coming from." Not just regarding the conversation at hand, but the history and perspective they offer. Own the sale. Own the job. Take control. Don't burden with unnecessary check-ins or volumes of questions.
- When problems arise, bring options for solutions. Don't just ID the problem. Prove that you've thought it through. Gratitude & humility will go a long way.

### Communicating with boomers

- Face to face works best. Relate use fluid sentences. Have fun. They're an optimistic group!
- Telephone: follow same rules.
- Email: full sentences; few abbreviations: openings and closings.
- Via web & instant messaging: maybe / maybe not. If they are on the younger side of the generation
- Texting- depends on the person. Often OK for the younger side of the generation.

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
As patients, generation X is the first generation raised where consumption is a way of life. Xers buy because they want it. They won’t waste their valuable time reading a lot of propaganda advertising that appears to ‘sell them’. They want product benefits and (if they can believe it) a list of what a product or service can do for them. With so much information at their fingertips because of the internet gen-Xers are cynics, biggest online shoppers & online banking consumers, stalk products / services (iPhone, apple lines), cautious and conservative and wary of experts.

Their loyalty is based on service and they enjoy carefully evaluating their experience with you based on truth, credibility and how dentistry will give them what they want. They are watching you during the ENTIRE diagnostic and treatment planning stages and have been known to still look for comparisons, shop around and like things that stand out from the rest and are not ‘more of the same’. You must convince them you are not doing it the traditional way, that other Xers are doing the same thing and that they will belong to your dental team by saying yes.

To appeal to gen-Xers loyalty you first need to understand them and their independence. Their feeling is that they developed themselves and have a lot of faith in their own abilities and don’t have much faith in older generations; probably because so many of them have seen their own families come apart in divorces.

As patients accepting treatment, generation X was raised in the ‘don’t speak to strangers’ era’ and as a result are: unless they know you they won’t listen to you, let alone accept your treatment. They must see the information about their oral health as useful and trusting while feeling like you have involved them the entire way. They’ll value you for involving them their own outcomes but will reject you just as fast as they can if you find you’ve misrepresented anything. The case presentation must be in lay terms, simple and connect to their life or they shy away from complex words and technical jargon and judge you on how efficiently you give them their treatment plans.

They won’t likely want to return for a lengthy consultation and may pressure you to tell them, get in and do it now and move to next thing.

Once they see the value of dentistry, believe in you and say yes. It will be on their terms of what is most convenient based on time before money.

Financially, Xer’s were raised in difficult economic times but have all the desires the boomers have. They often don’t have the credit status and live beyond their means.

Selling to gen X

 distrust anything too promotional, salacious, or marketing-y
sell the sizzle, they see right through the sizzle
Careful of too much vanity promo
Where to go / how to get more information – websites, referral sources, product / service reviews etc.
Data and information, more is better.
They will use the technology available to double check what you’re telling them

Communicating with gen X

Probably will prefer email updates.
Likely let your call go to voice mail and then check the message to see how important it is and how quickly they need to call you back.
Texting is ok: if content is 1) a request of 2) information: not chatty
Face to face: your patients will not want to make hard and fast decisions face to face. Let them think about it and do their research.

What seems to matter to gen Xers:

The individual, the ego
How things will affect their lives
How things will make them distinct
How you’ll impact their future
How they’re different
As patients, generation Y marketing message to attract them needs to be socially conscious, fun and trendy. They are remarkably diverse and have been exposed to slick ads and commercial messages. They distrust advertising and a 2010 study showed they value companies that support good causes and that 89% would switch service providers for one who gives back to the less fortunate or support charitable community initiatives. They thrive on contests and promotions. They are a great segment for internal “refer a friend” programs as 56% of generation Y share information about interesting products and services with their friends and family as they happen in real time.

They assume technology is a part of their dentistry and will speak up if they don’t see evidence that the dental practice is “state of the art”. This generation prefers to communicate through the written word of e-mail and text messaging rather than face-to-face contact and prefers webinars and online technology to traditional lecture-based presentations.

They are optimists in their loyalty but realists with their service expectations. They will be drawn to what is cool and has cachet and once they feel it is mainstream, their loyalty shifts easily based on their friends and parental approval. They place less importance on location and long-term reputation and are much more interested in their most recent experiences, including wait times and interaction with staff if they have to sit in the waiting area for any length of time, they won’t hesitate to go elsewhere for their next appointment.

---

**Millennials (Y’s) As Patients**

As patients, generation Y wants information now! They want information easy and information quick. They will uncover poor organization and lack of sophistication if you don’t have a speedy communication channel and a website for them to visit.

Gen Y has a take charge attitude about their appearance and health. They welcome education that enhances their well-being. Gen Y doesn’t want to be instructed on what to do, but steered through the decision-making process. As they begin taking ownership of their health, provide them with enough information to make educated decisions.

As far as spending they represent a large disposable income controlled by today’s child who grew up in economic prosperity with a new tool of the internet for immediate gratification.

The Y’s are individuals w/ a group orientation: i.e. I too have a tattoo but MINE is different. Optimistic, well looked after, “future” is very short term. Huge goals. As of 2013 U.S. Census bureau: this group is the highest number (%) of a generation at this stage still living with their parents. 31.5 million

1. Recognize individuality & uniqueness: (the generation that was awarded for showing up)
2. Recognize their strong social desires
3. Responsible for lots of debt: personal and national
4. Remain highly optimistic. Still holding on to their dreams, don’t rain on their parade and don’t take goals away

---

**Communicating With All Generations**

*For patients self-discovery, and Q & A, don’t tell ask, engage in a dialogue.*

All generations don’t want to know “all” that you know, they want to know what pertains to them!

For the boomers: “Here’s what I’ve done that proves I know what I’m doing and that I deserve your business (expert position).

For gen X and millennials (gen Y) “if you engage my services here is what you can expect to happen at step 1, step 3 etc.”

---

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Recommended Resources

- Sticking Points By Haydn Shaw
- Generations At Work Zemke, Raines & Filipczak
- Anything You Can Read Or Watch By Cam Marston
- https://Generationalinsights.Com/

Post course self-administered Test

1. Which answer (s) are representational of Leadership qualities
   A. Accepts the status quo
   B. Focuses on People
   C. Asks how and when
   D. Asks What and Why
   E. Eye is on the Horizon

2. The problem solving model includes brainstorming, which answers are not recommended during the brainstorming process
   A. Begin by discussing the reasons why this isn’t working
   B. Be Creative
   C. Ideas should be thrown out immediately if they were tried before.
   D. Take Risks
   E. Criticism is allowed

3. As a self-directed leader which answer (s) are needed for your growth?

4. If your leader is a millennial what can you anticipate will be a part of their vision?

5. Boomers represent a large portion of the population, how do they prefer to be communicated with?

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com
Post course self-administered Test answer key

- Question 1: (B) (D) (E)
- Question 2: (A) (C) (E)
- Question 3: (A) (B) (D)
- Question 4: (A) (B) (C)
- Question 5: (C)

Cindy Ishimoto, CDPMA
www.cindyishimoto.com *
cindy@cindyishimoto.com