

Course Outline

Revised 04.30.24

Office
Manager
Academy

Module 1: The OM Defined

- Brief Intro to Ortho
- Why it Matters
- The Ortho Patient Journey
- The 5 Roles of an OM

Module 2: Who You're Leading

- Why "Family" is a Loaded Term
- The 7 Doctor Types
- Departments & Positions
- The Admin-Clinic Divide
- Your Practice's Org Chart

Module 3: The Great Talent Search

- Defining Roles & Responsibilities
- Where to Hire & What to Look For
- Interviewing Essentials
- Compensation
- Effective Onboarding & Training

Module 4: Building Office Culture

- Defining Culture
- Setting Expectations & SOPs
- Accountability Systems
- The Rhythms of Culture
- Management vs. Leadership

Module 5: Creating Your Patient Experience

- Establishing Your Brand
- The Importance of "Digital-First"
- Customer Service vs. Hospitality
- Creating a Vibe
- Nailing Your Communication

Module 6: Scheduling & Appointment Mgmt

- The Link Between Your Schedule & Your Sanity
- Driving Doctor-Time Efficiency
- Streamlining Workflow Processes
- Maximizing Non-Doctor Days
- Patient Emergencies & Rescheduling

Module 7: Office Management Technology

- PMS Platforms & Digital Records
- Team Coordination
- Task Management
- Software Upgrades

Module 8: Financial Management

- Insurance Basics
- Revenue Cycle Management
- Controlling Overhead & Expenses
- Setting & Monitoring Practice KPIs

Module 9: Regulatory Compliance

- Physical Safety & OSHA
- Patient Data Privacy & HIPAA
- State-Level Medical Operations
- Financial Safety & Cybersecurity

Module 10: Saying Goodbye

- The Inevitability of Farewells
- Why Do They Leave?
- Creating a Paper Trail
- Parting Ways Gracefully

Module 11: Practice Marketing & Growth

- The 3 Pillars of Ortho Marketing
- How to Attract & Retain Patients
- 5 Core Practice Marketing Strategies
- Healthy Scaling

Module 12: What's Next?

- Course Recap
- Integrating What You Learned
- Where Do We Go from Here?
- Final Thoughts