

Dental practice consulting.
Strategic. Targeted. Impactful.

MERCER |
ADVISORS™

Practice
Consulting

Just as sports heroes have professional coaches, successful dentists have professional practice consultants.



Our dental practice consulting modules target specific areas of opportunity within your practice. Our consulting modules are facilitated by dental office operation experts and can help you to generate growth and increased profitability in order to impact and accelerate the success of your practice.

Our Certified Practice Analysts bring a fresh, critical eye to your practice. They collaborate with you and your team to implement strategies designed to enhance the established systems within your practice. You begin by identifying your goals and then proceed to craft a vision statement with your team, under the guidance of the Practice Analyst. Next, you collaborate with your team using field-tested strategies to move toward your common vision, creating lasting and meaningful success for all involved in the process. Your analyst supports and advises you every step of the way.

Most importantly, growing your practice affords you more options to service your patients and impact your lifestyle. Possible opportunities include adding an associate or increasing your support staff, expanding your facilities, reducing your hours or attaining financial freedom earlier than expected.

With each consulting module, you receive:

- An onsite visit from a Certified Practice Analyst
- A written vision for success to drive the strategies introduced, build team alignment and gain consensus
- Strategy workbooks, step-by-step guides and sample language scripts for reference as you implement your new strategies
- A detailed Implementation Report of the visit, which includes a summary of actions taken and decisions made, a recap of the onsite visit and future recommendations for achieving your vision
- Two follow-up consulting calls* to support the strategies learned and the coaching received during the onsite visit

*Mercer Advisors 360° Planning clients receive on-going coaching as part of their web-based sessions with their Practice Consultant.



FOUNDATION SERIES

The Foundation Series consulting modules encompass a succession of topics designed to address the core systems and operations within your practice. You may select a single module focused on an area you wish to improve or move through each of the four modules — one by one — for a progressive and complete practice renovation experience.

Creating the New Patient “WOW” Experience

Focused on retaining new patients, you will implement strategies to create a WOW experience from a new patient’s initial contact forward, to stand apart from other practices using a more intimate service approach and to encourage new patients to refer family and friends immediately.

Format: 3-day onsite

Retaining Patients for Life

Focused on retaining existing patients, you will implement strategies designed to encourage growth within your hygiene department, maintain a full hygiene schedule and keep patients coming back for regular care. These strategies reinforce a strong practice foundation and allow for increased productivity.

Format: 3-day onsite

Increasing Case Acceptance

Increase your case acceptance — and case value — by implementing strategies to improve your approach to case planning, case presentation and financial discussions so patients agree to and schedule treatment prior to leaving the office.

Format: 3-day onsite

Increasing Practice Production Using Strategic Scheduling

You will implement ideal-day templates and other scheduling strategies to eliminate chaos in your office, reduce the stress level of your team and increase both doctor and hygiene hourly-production rates. Enable your practice to work “smarter not harder.”

Format: 3-day onsite

ENHANCEMENT SERIES

The Enhancement Series consulting modules address various topics focused on further developing your practice in order to reach your goals. You may select a single module at any time — however, results likely will be heightened if your practice has a solid foundation of systems upon which to build.

Attracting New Patients Using the Internet

Implement marketing strategies to increase your new patient flow, attract the “ideal” patients and encourage referrals. Also receive the following marketing deliverables:

- Internal and external marketing plans
- Aggressive internet marketing service
- Online reputation builder service

Format: 2-day onsite plus first year of online services†

Growing Your Hygiene Department by Enhancing Periodontal Care

Develop a customized periodontal program to educate your patients about gum disease and increase periodontal treatment acceptance. Includes one-on-one treatment plan training for your hygienists and a team session designed to develop skills for responding to patient questions, recommending treatment and scheduling treatment onsite.

Format: 3-day onsite, 16 CE credits

Integrating a New Associate Successfully

For practices with a new associate, plan each step of the integration into your practice to ensure a seamless and successful transition. Implement strategies to motivate your team, promote the new doctor and maintain patient loyalty to your practice.

Format: 3-day onsite

CREATE YOUR OWN CONSULTING MODULE

Mix and match strategies from existing consulting modules that best fit your individual goals. The number of onsite days and deliverables will be determined by your selection.

†Online services provided by an outside marketing firm. Second year services quoted separately.



MERCER ADVISORS BRANCH LOCATIONS

Atlanta | Boulder | Chicago | Columbus | Detroit | Houston
Philadelphia | Santa Barbara | Sarasota | Scottsdale | Seattle

About Mercer Advisors

Established in 1985, Mercer Advisors Inc. is a total wealth management firm that provides comprehensive financial planning and investment management, as well as other financial services including proactive tax planning, insurance, retirement plan design and administration. In addition, for dental professionals, Mercer Advisors offers practice consulting and transition services.

Kendrick Mercer, the founder of Mercer Advisors, was dedicated to improving the lives of his clients both professionally and personally. This dedication continues today as Mercer Advisors currently helps more than 3,300 clients to fund their life goals and support their lifestyle throughout retirement.

Quick Facts¹:

- More than \$3.9 billion in assets under management
- Over 150 employees including Certified Financial Planners™, CPAs, MBAs, attorneys, retirement plan specialists, practice consultants and transition specialists
- National presence with branch offices located in 11 major cities
- Ranked by Investment News² as one of the top five financial planning firms in the U.S.
- Ranked by Investment News² and Forbes² as one of the largest Registered Investment Advisors in the U.S.

¹Data as of May 2011.

²Mercer Global Advisors Inc. is registered with the Securities and Exchange Commission and delivers all investment-related services. Mercer Advisors Inc. is the parent company of Mercer Global Advisors Inc. and is not involved with investment services. Forbes and Investment News rankings are for Mercer Global Advisors Inc. Rankings are based on assets under management.

Services are subject to change with or without notice.

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