

# 25 Signs Your Dental Practice Needs Better Systems

A self-assessment checklist for dental office managers & practice owner

**How to use this checklist:** Go through each item honestly. Check every box that applies to your practice right now. If you check 5 or more items in any section — or 10+ overall — your practice has a systems gap that's costing you time, money, and team retention.

## ★ TEAM TRAINING & ONBOARDING

- 1 **New hires are trained informally — mostly watching others**  
*No structured onboarding = inconsistent performance from day one*
- 2 **Training differs depending on who is available that day**  
*Inconsistency in training leads to inconsistency in patient experience*
- 3 **There is no written onboarding checklist or timeline**  
*If it's not documented, it doesn't exist*
- 4 **New team members feel lost or unsupported in the first 30 days**  
*High early turnover is almost always a systems failure, not a people failure*
- 5 **No one knows exactly who is responsible for training new hires**  
*Undefined ownership = things falling through the cracks*

## ▲ STANDARD OPERATING PROCEDURES (SOPS)

- 1 **Procedures are in people's heads, not written down**  
*When a key person leaves, critical knowledge walks out the door*
- 2 **There is no office manual or systems binder**  
*Every practice needs a single source of truth for how things are done*
- 3 **Staff handle the same tasks differently depending on the day**  
*Inconsistency frustrates patients and confuses your team*
- 4 **When you're out, the office can't run the same without you**  
*You should be able to be gone for a week without chaos*
- 5 **You've had the same problem come back multiple times because it was never documented**

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## ● BILLING & COLLECTIONS

1 **Insurance claims sit in a queue without a daily submission process**

*Every day of delay is a day of delayed cash flow*

2 **AR (accounts receivable) reports aren't reviewed on a set schedule**

*Unreviewed AR becomes uncollected revenue*

3 **Patients leave without their balance being addressed**

*A clear end-of-visit financial conversation is a system, not a personality trait*

4 **There is no written financial policy given to every new patient**

*Ambiguity in financial expectations creates conflict and write-offs*

5 **Write-offs happen without a formal approval process**

*Every write-off should be a decision, not a default*

## ◆ SCHEDULING & PATIENT FLOW

1 **The schedule has gaps that feel impossible to fill consistently**

*An unfilled schedule is often a systems problem, not a marketing one*

2 **Patients cancel or no-show without much follow-up**

*A confirmation and re-appointment protocol fixes 80% of this*

3 **The schedule looks different every day with no clear template**

*Ideal day scheduling is a game-changer for production predictability*

4 **Providers feel rushed or have too much downtime back to back**

*Poor flow is a scheduling system issue*

5 **The front desk makes scheduling decisions without clear guidelines**

*Staff need decision rules, not just instincts*

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## ■ COMMUNICATION & TEAM CULTURE

1 **Morning huddles don't happen — or feel pointless when they do**

*A structured 10-minute huddle is one of the highest-ROI habits in dentistry*

2 **Team meetings are infrequent or turn into complaint sessions**

*Meetings without agendas and outcomes are just expensive conversations*

3 **Staff don't know the practice's monthly production goals**

*A team that doesn't know the goal can't help hit it*

4 **Conflicts between team members go unaddressed for too long**

*Tension without resolution becomes turnover*

5 **There is no clear feedback loop between the doctor and the team**

*No feedback = no improvement = no growth*

**Checked 5+ boxes? Your practice has a systems gap — and I can help you fix it.**

Book a free 20-minute Practice Clarity Call or explore done-for-you SOP templates at [DigitalDental.io](https://DigitalDental.io)