

5 Steps to Run a Medical Office Efficiently

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We all want our medical offices to run as efficiently and smoothly as possible.

Unfortunately, there are some mornings that just fall flat and, before we know it, they've completely fallen apart. These are the types of mornings that even Starbucks can't fix!

Picture this. You [★1](#) get to the office and open up the computer to an unfinished email you started mid-day yesterday, the first patient of the day is 15 minutes late, you get a

notification that [a patient posted a negative review that now needs addressing](#), collections are way behind where you'd like them to be at this point in the month, and suddenly today is the day everyone decides to call first thing in the morning to schedule their [overdue appointments](#). Sound familiar? These are the types of days where we'd all just like to climb back into bed and pull the covers over our head!

We know that managing your medical office efficiently maximizes productivity (isn't that what we're all striving for??). Not only that, but [efficient practices are statistically more profitable](#) than their less-efficient counterparts. [★1](#)

[Studies](#) show that overhead in practices that aren't focusing on efficiency takes up around 60 percent of all practice revenue. Compare that to the overhead in efficient practices—it takes up just 35 percent of revenue. That's a huge difference!

Practices that run efficiently are thus able to see fewer patients, which improves both patient and staff satisfaction levels and allows a practice to be even MORE efficient. It is a win-win-win all the way around.

Fortunately, there are some simple steps you can use to keep your office running as smoothly and efficiently as possible. By adding in a few organizational strategies and daily habits, you can reduce some of the stress created by unexpected and challenging problems that may pop up from time to time.

So without further ado...

Five steps to run a medical office efficiently:

1. **Automate, automate, automate**—Technology is one of the greatest friends of an efficient practice. Done right, technology can eliminate errors, improve patient access, and save time. Technology can now automate many time-sucking tasks such as appointment reminders, newsletters, recare, and more. That being said, it is critical that everyone in the office is fully trained and mentally on board with any new technology. If not used to its full advantage, technology can actually slow things down. Don't let the benefits of technology go wasted.
2. **Use an online scheduling tool**—Online scheduling is such a huge time saver that it deserves its own category. It takes an average of 8 minutes to schedule each and every appointment. That time adds up quickly and many offices spend way too much valuable time throughout the day scheduling appointments. Implementing a [real-time online digital scheduling tool](#), where patients can schedule their own appointments will help cut back significantly on phone time wasted scheduling and rescheduling appointments. Use your automated newsletters as well as in-office communication to help patients become aware of the option to book online.
3. **Add a daily 15 minute "Stand-up"**—Originally a [strategy implemented into engineering teams](#), this is a highly effective activity that can be adopted by any type of business and only takes a few minutes. One of the biggest efficiency killers is poor communication. Adding in a "stand-up" will improve the communication throughout the team. As a team, review your progress for the day and identify and prioritize remaining tasks to be finished that day.



1. Are there unfinished tasks from yesterday (x-rays that need to be unloaded to patient portals, insurances claims that still need to be processed, etc.) that still need to be completed?
2. What items on your Action List have to be finished today?
3. What items have you not had time to get around to that can be pushed to tomorrow? (Or, if you're done with today's task list—what can you pull from tomorrow's and get a head start on?)
4. What procedures and appointments do you need to prep for or confirm today?

4. **Look ahead**—Knowing what to expect on the schedule, what patient information will need to be gathered, and what holes need to be filled, is critical to maintaining the highest level of practice efficiency and profitability. At the end of the day, take a couple of minutes to review tomorrow's to-do list, evaluate and rank items, procedures, communications, etc. by priority. You can then determine and designate deadlines and assign task items to each team member beforehand. Follow your list religiously and work to not get distracted by less important work.
5. **Take a close look at scheduling**—For both patients and staff, proper scheduling can have a huge impact on efficiency. Every minute counts when it comes to running an efficient medical practice. You know your patients best. Think about their natural tendencies based on their demographics—age, location, gender, work-status, and more (if you need to learn more about how to get a good profile of your average patient, check out [this blog post](#)). You may have patients that drive long distances. You may have patients that always come 15 minutes early. Take these habits into consideration during scheduling. If your first appointment is at 8:30 but patients tend to show up at 8:15, consider having your staff arrive at 8 to be able to start appointments early and get ahead. You can do the same thing at lunchtime. Learn more tips about efficient scheduling [here](#).

Running your practice in an efficient way will lead to improved morale and higher profitability. Start by trying to save a few minutes every day and work up from there. Set the expectation of efficiency with all staff members by having an established routine and daily “stand-ups.” This will allow everyone to reap the benefits of a less stressful environment. With a more structured and organized working environment, staff and patient satisfaction are bound to be the result!