

# SEE A NEED, MEET A NEED

To commemorate **the Scheduling Institute's** 20-year anniversary and 20,000th On Site Training delivered, we recap some of its most important milestones, and learned how the company has evolved to help dentists grow. SI's offerings have expanded as its clients' needs have revealed themselves. Today, SI offers 23 different team trainings, three levels of doctor coaching and hosts the largest private events in dentistry. SI is still best known for its original solution, the New Patient Results/Phone Training System.

by **Dentaltown staff**

## 1995

Scheduling Institute founder and CEO **Jay Geier** discovers that the practice he works in keeps losing potential new patients on the phone. He creates **New Patient Results/Phone Training System** and sets a record—601 new patients in one week.

## 1997

Geier decides to put his system to work in practices all over the country and strikes out on his own to create the Scheduling Institute (SI) and begin selling the New Patient Results/Phone Training System as a "do-it-yourself" **Self Implementation Kit**.



## 1997–2006

Geier expands SI's office from 1,200 to 2,400 square feet and hires the company's first five employees to keep up with its growing number of clients. Today, SI's headquarters in north Atlanta is **36,328 square feet**.

## 2007

In response to client requests, SI introduces a new "done-for-you" version of the New Patient Results/Phone Training System called **On Site Training**. With On Site Training, a trainer implements the system in a dentist's office.

## Case Study



**Dr. Richard Turner Gray, Tennessee**  
*SI client since 2015*

Dr. Richard Turner describes the early years in his practice as "a lot of time sitting around waiting for patients. We tried everything: direct mail, newspaper ads, TV ads, you name it."

He had opened his practice cold—bought a building that was a dental practice in the 1980s and remodeled it. His mindset was strictly on improving his clinical skills. "I thought, 'If I try to be the best possible dentist in the world, people would come to me because of that.' I found out that's entirely not true," he said.

The early days of the practice were dreary. Turner didn't like coming in, and no-shows and cancellations were very high.

Fast-forward nine years, to when the practice joined the Scheduling Institute. "It has absolutely paid for itself in new patients—and also in the positive change in the staff's attitude and outlook on things," Turner said.

Before SI, Turner saw about 20 new patients a month; now that number is consistently more than 50. The team also lights up when they talk about how SI has helped them grow personally, and describe it as "a complete turnaround."

*Dr. Turner discusses even more about his success as a Scheduling Institute client in a video at [stories.com](http://stories.com).*

## Case study



**Drs. John Kwant and Joe Maio**  
Salt Lake City  
Client since 2012



Drs. John Kwant (above) and Joe Maio (below) began working with the Scheduling Institute just over five years ago, during a time when they were feeling

stuck and hopeless.

"I was mad at my staff, not sleeping and finding little joy in the passion that brought me into dentistry," Maio recalls. "Everything that had been fun just became a job."

His first inclination was to work harder and do more dentistry to get off the cycle. But the doctors realized they lacked direction and vision. Their introduction to the Scheduling Institute was a CD they received in the mail that claimed to automatically increase new patients by 25 percent in their practice by using the New Patient Results/Phone Training System.

"It was fantastic," Kwant said. "As soon as we implemented it, we started to see an increase. We quadrupled their promise to 100 percent in a matter of a couple months." The team was excited because it cut their phone call time down to one-third of what it was and they were seeing more new patients come in the door.

The doctors saw a new level of engagement from their team and decided to implement the system in their three practices; it proved successful each time. Having found the success in one SI system, the team decided to try the other systems and programs SI had to offer, and joined the 5X coaching program.

In the five years since joining SI, Apex Dental has gone from 20 new patients a month to 500. It also transformed from two practices that earned a little more than \$1 million combined to eight practices earning \$10 million in Utah, where the average dental practice does \$500,000–\$550,000.

*Drs. Kwant and Maio discuss more about their success as Scheduling Institute clients in a video at [sistories.com](http://sistories.com).*

# 2008

SI begins two major initiatives to advise clients and provide solutions to grow their practices beyond the New Patient System. It hosts the first live event for clients and launches a content magazine for clients, *The Practice*. Today, SI annually hosts 1–2 big live events and dozens of monthly workshops.



# 2009



SI opens its first training center in Atlanta. After several expansions, it's now a 20,000-square-foot facility where thousands of doctors and staff attend annual training.

SI begins offering doctor coaching to help its clients develop vision and goals and navigate growing a practice. Its deliverable is "make more money, work less."

# 2015



SI opens a second training center in Phoenix. The 23,180-square-foot facility serves as a more convenient location for West Coast clients to attend coaching workshops and training.

Eight years after the first on-site training was conducted, SI trainers complete their 10,000th visit, marking a huge milestone for the company.



# 2010–2016

SI wins Townie Choice Awards seven consecutive years.

# 2016

The SI team is now **200 strong**, dedicated to helping clients get results.

# 2011

A new, elite level of doctor coaching, **5X**, is added. As the name suggests, the coaching is designed to grow a practice five times through increased collections, net worth and practice equity. The average 5X practice increases its collections by \$500,000, or approximately 20 percent per year. The top 20 percent of 5X clients have an average net worth of \$7.3 million and average annual income of \$794,000.

# 2012

SI hosts **The Best Marketing Seminar Ever** event. Clients submitted video testimonials of how SI's programs and systems benefited their practices, then voted which of their peers had the most exceptional story. The winner went home with a Lamborghini!



# 2013–2014

SI receives the **Best Place to Work** and **Fastest Growing** Awards.



# 2014



**The Summit, SI's largest live event to date**, hosts

5,297 doctors and their teams at Philips Arena in Atlanta. This is the first event SI hosts for the entire practice team.

Attendees raised \$214,644 for the Wounded Warriors Project as a demonstration of their commitment to giving back.



SI gives back 10 percent of its profits to local, national and international charitable organizations, and Geier specifically teaches his employees and clients about the impact of generosity. As a demonstration of this commitment, SI

**formed a partnership with World Mission Partners** and hosts opportunities for SI employees and clients to experience mission work and philanthropy. To date, 49 doctors and 190 team members participated in these mission trips and have treated a total of 2,472 patients.



# 2017



SI is scheduled to **complete its 20,000th On Site Training** by the end of the year, a great representation of its experience. SI now has 54 trainers based out of 11 cities and three countries and trains in, on average, 400 offices every month.

SI hosts the **Ultimate New Patient Attraction Event**, the largest doctor-attended SI event so far, with 715 doctors.

# GOING STRAIGHT TO THE SOURCE

In the past 20 years, Jay Geier and the team at the Scheduling Institute have proved that a steady, consistent flow of new patients is a very effective way to grow a dental practice. Since the company began, the Scheduling Institute has developed a long list of training and coaching services to help dentists grow their practices and run them as successful businesses.

Of all the services, the first one SI created remains the cornerstone and starting point for its clients: the New Patient Results/Phone Training System. Its effectiveness and results are guaranteed. Most clients see an average 24.5 percent increase in the first 90 days, but it's not uncommon for clients to see increases of 50 percent, or even more than 100 percent.



The system doesn't generate new patients; rather, it recovers patients a practice didn't realize it was losing. Ninety-eight percent of new patients call before coming into your office, which means your front desk is the gatekeeper to your schedule.

Properly trained front desk team members become revenue producers; if not trained, they could be costing you more than just their salary.

SI's research has found that most dentists lose 10–50 percent of potential new patients every month. For a practice seeing 20 new patients a month, that's at least two patients lost per month. Using an average lifetime revenue figure of \$2,000 per patient, that's \$48,000 a year lost. SI helps its clients recover these losses. Just like the three dentists in these case studies, thousands of dentists have worked with SI over the past 20 years and initially interacted with the company in the same way. They all took the 5 Star Challenge!

## Find out how much new patient opportunity you have

The 5 Star Challenge is an opportunity for prospective clients to learn exactly how well their team is trained and how well they perform at turning prospective new patient phone calls into scheduled appointments. It's a discovery and education process—for many doctors, it's the first time they've examined their patient intake process and scrutinized how new patients are being handled the first time they call.

The 5 Star Challenge involves SI conducting a mystery call and providing evaluation, feedback and a rating based on its unique criteria. Practices that receive a rating of 0–3 could within 90 days see a new patient increase of 10–50 percent. Practices that score higher are already in a great position to continue marketing and growing.

To take the 5 Star Challenge, go to [schedulinginstitute.com](http://schedulinginstitute.com) and click "Take the 5 Star Challenge" at the top. SI will send an educational video series that will walk you through the process. If you're ready to get the training program implemented in your practice, call 833-211-9381. ■



## Hear more from successful docs

The dentists featured in this package have more to say about the Scheduling Institute. To watch their videos and more, visit [sistories.com](http://sistories.com).

## Case study



**Dr. Eric Hans  
Trappe,**  
Pennsylvania

*Client since 2016*

Dr. Eric Hans admits he'd never heard of the Scheduling Institute until December 2015, when he responded to a mailer on the front of a dental magazine that asked, "Do you want more patients?"

As a pediatric dentist who's been in practice for 20 years, Hans loses 50–100 patients a year who graduate to general dentists. He'd already realized at the rate he was losing patients, he'd be out of business in 10 years if he wasn't always filling the pipeline.

Shortly after responding to the ad, he received a package of free information from SI. He and his office manager decided to give the program a shot because it came with a money-back guarantee.

The same team member who hated SI had a change of heart after learning more about the system. "Once we got into it and found out what it was all about, it was totally different," Hans said. "I just regret not hearing about SI sooner."

Hans' practice went from averaging 40 new patients a month to 67 within three months. SI's system proved them wrong and they were thrilled with the results. With the new patient problem addressed, Hans could now focus on other challenges within his practice. The team was experiencing frustration and Hans' quality of life was suffering. It was common that he went to work before his children even woke up and got home after they'd already gone to bed.

Hans decided to try SI's coaching membership to focus on improving both his situation as the business owner and his team members' situation as well. Now, 22 months later, their monthly new patient average hovers around 60, his team is happier and has more responsibility, and Hans is able to spend more quality time at home with his family.

*Dr. Hans discusses even more about his success as a Scheduling Institute client in a video at [sistories.com](http://sistories.com).*