4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Chief Operating Officer (COO)

Keep operations accountable so doctors can focus on care.

Team **Leadership**

Reports to **Owner Doctor**

Inside **4R, interview guide, 90-day plan, job post**

R1 The role

As Chief Operating Officer at [Practice Name], you serve on the Leadership team and report to the Owner Doctor. You lead daily operations through the practice manager and department leads, connecting the front desk, treatment coordination, clinical support, and financial teams. You turn the doctor's goals into clear budgets, staffing plans, operating standards, and measurable improvements across the orthodontic patient journey. This seat exists to build a dependable practice that supports patients and team members while keeping clinical decisions with the Owner Doctor.

R2 Responsibilities

Leadership and Accountability

- Translate the Owner Doctor's priorities into quarterly operating plans with clear owners, budgets, and deadlines for improvements from consult intake through retention visits.
- Lead weekly reviews with department leads to address consult follow-up, chair capacity, patient concerns, and staffing gaps before they disrupt care.
- Coach the practice manager and department leads on hiring, onboarding, performance feedback, and cross-training for orthodontic workflows.
- Clarify which operational decisions leaders can make independently and which treatment, spending, or staffing decisions require the Owner Doctor's approval.

Scheduling and Capacity

- Partner with the Owner Doctor and clinical lead to set scheduling templates for consults, records, bonds, adjustments, debonds, retainers, and aligner visits.
- Review doctor time, chair availability, appointment lengths, and staffing coverage to correct bottlenecks without shortening clinically necessary visits.
- Build a same-day start process with treatment coordination and clinical leads that requires doctor approval, completed records and agreements, and available capacity.
- Hold scheduling leaders accountable for cancellation recovery and overdue adjustment, aligner, and retainer follow-up using doctor-approved priorities.

Patient Experience and Starts

- Standardize handoffs from the new patient call to the consult, financial discussion, records visit, and treatment start so families know what happens next.
- Establish pending list ownership and follow-up routines that document each family's questions, next step, and preferred contact method without pressuring treatment decisions.
- Review patient complaints with department leads, assign resolution owners, and correct recurring problems with communication, wait times, or billing.
- Audit operational readiness for bonds, debonds, and aligner delivery so missing paperwork, appliance orders, or payment arrangements are addressed before visits.

Financial and Operating Controls

- Build and manage the operating budget with the Owner Doctor, including staffing, orthodontic supplies, lab costs, aligner costs, and equipment needs.
- Review production, collections, accounts receivable, and payment-plan exceptions with the financial lead to identify discrepancies and assign follow-up.
- Set purchasing approvals and inventory controls for brackets, wires, retainers, and aligner supplies while preserving the doctor's authority over clinical product selection.
- Maintain operating procedures for patient information access, payment handling, vendor management, and incident escalation, consulting qualified advisers when needed.

R3 Results at 90 days

Reliable Appointment Flow	Scheduling templates and staffing coverage support timely orthodontic visits without routinely overrunning the doctor's planned capacity. Measure: The Owner Doctor reviews a weekly scheduling dashboard showing [goal] % of visits starting within [number] minutes of the scheduled time, broken out by appointment type.
Consistent Consult Follow Through	Families leave consults with clear next steps, and the pending list receives timely, documented follow-up that supports informed treatment starts. Measure: The Owner Doctor reviews the weekly pending list for [goal] % of entries with an owner and dated next step, alongside [number] doctor-approved treatment starts per week.
Controlled Operating Costs	The practice meets its approved operating budget while addressing overdue balances and protecting the resources needed for patient care. Measure: The Owner Doctor reviews monthly financial reports for operating expenses within [goal] % of the approved budget and balances older than [number] days at or below $ [amount] .
Accountable Department Leadership	Department leads consistently complete agreed priorities and maintain training coverage for essential orthodontic workflows. Measure: The Owner Doctor checks a monthly leadership scorecard for [goal] % of commitments completed on time and [goal] % of designated backup staff signed off on assigned workflows.
Dependable Patient Issue Resolution	Patient concerns receive clear ownership, timely resolution, and process changes when the same problem keeps recurring. Measure: The Owner Doctor reviews a monthly issue log for [goal] % of concerns resolved within [number] business days and repeat issues at or below [number] per month.

R4 Requirements

Essential skills

- **Operational planning.** Turn the Owner Doctor's goals into budgets, staffing plans, scheduling standards, and projects with named owners.
- **Leadership and coaching.** Develop department leads, handle difficult feedback, and hold teams accountable without taking over every task.
- **Financial analysis.** Interpret operating statements, collections reports, accounts receivable aging, and orthodontic supply and lab spending.
- **Workflow improvement.** Use practice management reports and team input to improve consult-to-start handoffs, appointment flow, and patient communication.

Qualifications

- Demonstrated experience leading operations in an orthodontic, dental, or comparable outpatient practice with responsibility for people, budgets, and service delivery.
- Experience managing managers or department leads and partnering directly with a practice owner or senior clinical leader.
- Working knowledge of orthodontic workflows, including consults, treatment contracts, payment plans, active treatment visits, and retention, or demonstrated success learning comparable clinical operations.
- Experience using practice management systems, spreadsheets, and financial reports to check data quality and guide operational decisions.

Attributes

- Stay calm and approachable when a full schedule, a worried parent, and a staffing gap need attention at once.
- Own mistakes, invite candid feedback, and follow through on commitments.
- Balance sound business judgment with respect for patients, team members, and the doctor's clinical authority.

Interview guide

Six questions tied to the 4R. Ask for a real example every time, then check the answer against R3.

01 Owner Partnership

Tell us about a time an owner or clinical leader set a growth goal that current staffing or capacity could not support, and explain how you reached an operating plan together.

Listen for: A strong answer shows respectful challenge, clear capacity and cost analysis, agreed decision boundaries, and a plan the leader actually supported.

02 Appointment Flow

Describe a time you fixed recurring schedule delays in an orthodontic or comparable outpatient setting, including what you measured and what changed afterward.

Listen for: A strong answer separates appointment mix, staffing, and handoff problems, involves the clinical lead, and demonstrates improvement without compromising care.

03 Consult Follow Up

Tell us about a time patients were getting lost between consultation and treatment start, and walk us through how you improved follow-up and measured the result.

Listen for: A strong answer shows clear pending list ownership, respectful family communication, reliable handoffs, and attention to clinical readiness rather than pressure to start.

04 Financial Judgment

Describe a time collections or operating costs moved off plan, including how you verified the cause, chose a response, and checked whether it worked.

Listen for: A strong answer distinguishes production from cash collected, uses reliable reports, and addresses the cause without indiscriminate cuts to patient care.

05 Developing Leaders

Tell us about a department lead who was not meeting expectations and how you coached them, set accountability, and decided what to do next.

Listen for: A strong answer includes specific expectations, direct feedback, practical support, documented follow-through, and a clear outcome.

06 Patient Service Recovery

Describe a recurring patient complaint you helped resolve, including how you supported the family and changed the process that caused the problem.

Listen for: A strong answer shows empathy, appropriate escalation, a named resolution owner, and evidence that the underlying problem became less frequent.

90-day training plan

Hand this to your new hire on day one. Training starts on the hire date and runs through a 90-day review against R3.

Days 1 to 30

Learn People and Practice Operations

- Train with the Owner Doctor on practice goals, clinical decision boundaries, spending authority, and expectations for the Leadership team.
- Shadow the practice manager, scheduling lead, treatment coordinator, clinical lead, and financial lead through consults, records, bonds, adjustments, debonds, retainers, and aligner visits.
- Review financial and practice management reports with the Owner Doctor and financial lead, establish baseline measures, and present a prioritized list of operational risks and opportunities.

Days 31 to 60

Lead Reviews and Test Improvements

- Lead weekly department meetings with coaching from the Owner Doctor, using a shared scorecard, assigned action owners, and clear escalation rules.
- Test one scheduling improvement and one consult or pending list improvement with the scheduling lead, clinical lead, and treatment coordinator, measuring results before expanding either change.
- Build a draft operating budget, staffing coverage plan, and purchasing approval process with the financial lead and practice manager for Owner Doctor review.

Days 61 to 90

Own Operations and Build Accountability

- Take ownership of operating reviews with the Owner Doctor, reporting results against agreed targets and explaining variances with corrective actions.
- Finalize operating procedures and backup training with department leads for scheduling, patient handoffs, payment controls, and complaint escalation.
- Present the next quarterly operating plan to the Owner Doctor, including approved budget needs, leadership development priorities, and evidence from the initial improvement tests.

90-day review date: [date] **Trainer:** [name]

Team member signature

Date

Manager signature

Date

Job post, ready to publish

Fill in the brackets and post it on Indeed, your website and your social pages.

Now hiring

[Practice Name] is hiring a Chief Operating Officer

A great orthodontic day takes more than a full schedule, it takes clear plans, supported people, and someone who notices the snag before it becomes everyone's afternoon. At [Practice Name], you'll join our Leadership team and report to the Owner Doctor, helping the practice run well while the doctor focuses on care.

You're a fit if

- You have led practice operations and can turn a big goal into a practical plan with owners, dates, and a budget.
- You coach managers with kindness and clarity, and you do not dodge the hard conversations.
- You can read a financial report and ask useful questions about collections, staffing, lab costs, and cash.
- You understand that a consult, a bond, and a retainer check need different amounts of time and preparation.
- You take patient care and follow-through seriously, but you can still laugh when the label printer has other plans.

What you'll do

- Partner with the Owner Doctor to set operating priorities, manage the budget, and make thoughtful staffing and spending decisions.
- Develop the practice manager and department leads so accountability does not depend on you answering every question.
- Improve scheduling for consults, bonds, adjustments, debonds, and aligner visits while protecting clinical standards.
- Strengthen pending list follow-up, patient handoffs, and financial controls so families and team members know what comes next.

What we offer

- Compensation: [pay range].
- Benefits: [benefits].
- Work schedule and location: [schedule], [location].
- Leadership development and onboarding support: [training and development details].

Send your resume and a short note about an operational improvement you led through [how to apply].