



Team Activity

Team Activity

Series 1 The Fundamentals

Session 1 New Patient Discovery (Part 1)

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1. Make a copy of this worksheet for each team member to use.
 2. Complete the Team Activity.
 3. Fax or email one “Master Worksheet” containing your team’s collective efforts.
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Send Us Your Master Worksheet

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1 Who's In Charge?

List the person that will be in charge of the New Patient Experience and New Patient Outcomes:

Choose which time period you'll be examining - the last 30 / 60 / 90 days:

Team Activity

Step 2 Get Specific

Complete the details below for your New Patient chart review:

Number of NP Phone Calls during your chosen time period: _____

Number of NP Calls that converted to appointments: _____

Number of NP Appointments that came in for a visit: _____

Did all NP Visits have a NP Interview? Yes or No? _____

Describe the NP Interview: what questions are asked and what's your process?

Review the diagnosis and treatment presented for each New Patient. Was the diagnosis comprehensive in nature? Is the diagnosis a mirror image of the photos and clinical documentation? If not, please explain.

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Step 3 Team Discussion

Have a team-wide discussion about all the factors listed in Step 2 and how they relate to your New Patient Experience.

What do you notice about your conversion?

What do you notice about the comprehensive nature of the treatment plans, or, lack thereof?

What do you notice about the patients who say yes and stick with their treatment plan versus the ones who delay?
