



# Team Activity

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## Series 1 The Fundamentals

### Session 10 Reactivation, Creating Retention and Preventing Attrition

**Listen Online**  
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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](mailto:Champions@DentalSuccessToday.net)**

# Team Activity

## Step 1 Review the Four Categories of Patients

**Before getting into the Four Categories of Patients, have one team member commit to owning the task of calculating your attrition over the next two weeks.**

That means, looking at every new patient from five years ago, four years ago, three years ago, two years ago, one year ago and six months ago to find out how many hygiene visits each of those groups of patients have come to on average.

### The Four Categories of Patients

#### **Recency (30 Days)**

Every patient you've presented treatment to in the last 30 days. This is the easiest time to get patients to commit to moving forward with treatment, so quality follow-up with them is critical.

#### **Unscheduled Treatment (2-5 Months)**

Every patient between hygiene appointments with pending treatment. For these patients, you're using their hygiene appointments to anchor case acceptance on their treatment. You're using a two-part strategy here: maintain (hygiene) and move forward (treatment).

#### **Hygiene Recall (6 Months)**

Depending on your perio, this can also be a 3-4 month interval. Emphasize the importance and wisdom of coming in for consistent maintenance instead of incurring the greater expense and greater pain of disease, emergency surgery or losing teeth.

#### **Expired Exams (1+ Years)**

It doesn't matter how long it's been. If there's unaccepted treatment, never stop reminding those patients of it and maintaining those relationships.

#### **Tip**

Every 90 days, run an "expired exams initiative." Pull a list from X number of years ago and contact those patients. Remember, every expired exam is a "new patient." This strategy is the easiest way to get someone into your practice for a comprehensive exam.







