



Team Activity

Team Activity

Series 1 The Fundamentals

Session 2 New Patient Discovery (Part 2)

Listen Online
dst.media/focus2

-
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.
-

Send Us Your Master Worksheet

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1 Pre-Visit

Establish Ideal New Patient Appointment Blocks

This is the optimal time each day for the “A” Patient NPE to be done, and the time you’ll ensure your New Patient Team is available:

- Treatment Coordinator
- Clinical Team
- New Patient Coordinator
- Etc

If you’re not able to execute the NPE that you’ve designed due to new patients being all over the schedule and key team members not being consistently available, having this block in place will be crucial to consistent execution of the New Patient Experience you’re crafting.

List where your New Patient Appointment Blocks are on your ideal schedule:

What’s the amount of time you need with each new “A” New Patient Visit to execute a comprehensive experience?

Team Activity

Who will own the Pre-Visit Phone Call?

Sample Pre-Visit Phone Call Script:

“Hello [name], this is [name] from Dr. [name]’s dental office... how are you doing today? I wanted to take a moment to introduce myself to you prior to your arrival for your first appointment with us so you have a familiar face when you arrive. Having said that, do you have any questions that come to mind that you’d like answered before you arrive for your first appointment?”

(Wait for patient’s response and answer their questions.)

If you happen to think of any between now and then, please write them down so you don’t forget, as we’d like to make certain we cover everything for you! We look forward to seeing you [date] at [time]. Have a great day!”

Team Activity

Step 2 The Visit

In-Office Interview

Your goal is to make the patient comfortable, begin building the case, engage them, and educate about optimal health and the possibilities of dentistry.

Choose a recent new patient and treatment plan your team is familiar with. Now, everyone involved, verbally run through the three components of the experience listed below and practice how you'd handle that new patient experience if you had ample time and the chance to do it over again.

1. Handoff to Clinical Team Member (the first Triangle of Trust)

How can you improve this portion of the experience?

For example, where may you be rushing, where may you need to invest more time, and where can you be making more deliberate, customized, personalized and engaging connections with your patient?

Team Activity

2. Dr. Exam / Diagnosis / Proper Set-Up

How can you improve this portion of the experience?

For example, where may you be rushing, where may you need to invest more time, and where can you be making more deliberate, customized, personalized and engaging connections with your patient?

3. Transfer to Treatment Coordinator (second Triangle of Trust)

How can you improve this portion of the experience?

For example, where may you be rushing, where may you need to invest more time, and where can you be making more deliberate, customized, personalized and engaging connections with your patient?
