



Team Activity

Team Activity

Series 1 The Fundamentals

Session 4 Mastering Daily Tracking

Listen Online
dst.media/focus4

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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 Perfect Your Huddles

Now that you've heard Scott's example of a perfect huddle, it's time to reflect on your own team's huddles.

What's your process for morning and evening huddles now, and what changes will you make to them to increase efficiency, productivity and stay future-focused?

Write what your morning huddles are like right now.

Write what adjustments you'd like to make to your morning huddles.

Team Activity

Write what your evening huddles are like right now.

Write what adjustments you'd like to make to your evening huddles.

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Step 2 The Five Buckets

Consider how you're integrating the Five Buckets into your practice.

Who's responsible for each bucket / column?

Bucket / Column 1: _____

Bucket / Column 2: _____

Bucket / Column 3: _____

Bucket / Column 4: _____

Bucket / Column 5: _____

How's the reporting being done at the end of the day?

Bucket / Column 1: _____

Bucket / Column 2: _____

Bucket / Column 3: _____

Bucket / Column 4: _____

Bucket / Column 5: _____

Team Activity

Step 3

What Are You Doing With Your Numbers?

Remember, the tracking sheets and numbers are for you and your team. We use the sheets to prepare for calls with the doctor and / or team champion. You should be using these numbers as a guide and benchmark to know how the team's doing - individually and as a unit - and to promote ownership and hold each team member accountable for their contribution to the daily goal.

How you arrive at these numbers is up to you, and how much information you track is put to you, but the most important numbers are:

- Treatment Diagnosed (\$)
- Treatment Scheduled (\$)
- Collected (\$)

These are numbers your team members should know at any given time because you're keeping track and discussing them when you meet with the team. Your tracking sheets / numbers are the scoreboard at the game: the players know the score, just like your team knows your numbers.

What numbers are your tracking?

Team Activity

How are you communicating those numbers to your team?

How are you using that information to your advantage in progressing toward your goals?

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Step 4 Takeaways and Commitments

What are your top takeaways from this Practice Focus?

What are your top three commitments related to tracking that you plan to refine and improve upon?

Commitment #1

Commitment #2

Commitment #3

Team Activity

What are your daily goals for creation (diagnosing and scheduled treatment) in these categories?

	Diagnosis Goal (\$)	Scheduled Goal (\$)
Hygiene	_____	_____
Restorative	_____	_____
New Patients	_____	_____
Reactivation	_____	_____
Specialty Procedures	_____	_____

If you're a Specialty Practice...

Write your goals for Consults / Leads / Starts Per Day:

	Consults	Leads	Starts
Monday	_____	_____	_____
Tuesday	_____	_____	_____
Wednesday	_____	_____	_____
Thursday	_____	_____	_____
Friday	_____	_____	_____
Saturday	_____	_____	_____

