



Team Activity

Team Activity

Series 2 Advanced Training

Session 2 Patient Engagement (Part 2)

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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 Making it Personal for Your Patients

As you take your patients on a journey along the pathway to health, it's a team effort to get your patients to the "state of ideal."

Whether you're a patient concierge, treatment coordinator, hygienist or doctor... whether your patient is on the phone, with you in the chair, a Triangle of Trust, or the consult room... these are the keys to "making it personal" with every patient.

The Four Keys to Making it Personal for Your Patients

1. Help patients create goals.

It's critical to not only establish an understanding of what patients' goals are, but to cast a vision of the "state of ideal." Patients may not even know what's possible for them to achieve, or, have long since forgotten what "complete oral health" looks and feels like.

2. Establish proper expectations with patients for their visits.

Your patients are just patients, they don't know what's going to be happening during their visit. It's up to you to take responsibility for their mental conditioning and set expectations.

3. Emphasizing the "comprehensive approach" you take and why you do.

A great way to do this is by leveraging your photos and x-rays, explaining to the patient each step of the way what you're doing, why you're doing it, and how it all ties together.

4. Reminding patients that being proactive and doing preventative care is the best way to support their longterm health and overall wellbeing.

Though you're experts and handling painful, emergency treatment when it arises, your number one priority is to make sure patients never get to that stage to begin with.

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Step 4 Role-Play

Form groups of three for role-playing.

Everyone will be playing one of these parts:

- Patient
- Concierge
- Clinical Team Member receiving the patient from the Concierge

Here are the steps of the patient experience you'll be role-playing:

1. New patient phone call
2. Walking the patient through the door
3. Patient interview (using the Four Keys outlined in Step 1)
4. Triangle of Trust with the clinical team member

As you move through role-playing, remember to use these tools at your disposal:

- Setting expectations
- Health history form
- Body language
- Eye contact
- Sharing your clinical philosophy
- Creating goals
- Detailing your comprehensive approach
- Emphasizing preventative and proactive care
- Sharing the resources you have available
- During the triangle, reinforcing what the patient has already said

And remember, move and speak with confidence!

Role-play now within your small group.

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Step 5 Team Discussion and Phone Calls

After role-playing, come together as full team and share your discoveries.

Write any collective commitments you're going to make to improve your patient experience.

Now that you've made breakthroughs in improving your patient experience, it's time to reverse-engineer your phone calls to help you facilitate your ideal patient experience.

- Are you getting enough information?
- Are you getting the right information?
- Is it being prepared and delivered properly to the Concierge or Treatment Coordinator?
- Is the Concierge or Treatment Coordinator fully ready, confident, and set up for success?

How can you improve your phone calls and help your teammates?
