



# Team Activity

# Team Activity

## Series 2 Advanced Training

### Session 4 Clinical Experience (Part 2)

**Listen Online**  
[dst.media/focus16](http://dst.media/focus16)

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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 Role-Play

Role-play your second Triangle of Trust by utilizing all twelve steps outlined for you.

Make sure each team member has a chance to go through the steps and time them out. At the end of this exercise, you should know about how long each step takes, and each person should know what verbiage they're comfortable using for transitioning through each step.

As a team, rotate role-playing the twelve steps together. As you do, write down specific verbiage or processes you'd like to use for each step.

### Twelve Steps to a Clinical Yes

**1. Clinical team member introducing the doctor.**

Team member shares some personal information about the patient to the doctor.

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**2. Doctor exchanges pleasantries with the patient.**

Doctor creates casual conversation with the patient based off of the information shared by the team member.

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# Team Activity

**3. Doctor asks for an update from the clinical team member.**

Doctor first involves the clinical team member before jumping into diagnosing.

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**4. Clinical team member shares the patient's goals, concerns and challenges.**

Team member is setting the patient up for success by circling back to the interview in the first Triangle of Trust, restating the information exchanged in that interaction.

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**5. Clinical team member pulls and reviews the records with the doctor.**

Team member should be using photos, x-rays, any resources you have, and pointing out specifics to the doctor.

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# Team Activity

**6. Doctor brings the patient back into the discussion by asking questions.**

The goal is to have the patient move emotionally into the discussion. Remember, if you're asking the questions, they're owning their problems and their treatment.

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**7. Doctor dives into the patient's goals and raises them up to the level of your vision of optimal health.**

The goal is to increase the patient's awareness, raise their expectations, and build desire for your vision of optimal health. Remember to use all these tools to help: need, want, deserve, pictures, proof and pain.

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**8. Doctor asks the patient for permission to begin the exam and reads clinical information to the team member.**

The purpose of this step is to create your charts, notes, and build the foundation of your treatment plan.

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# Team Activity

**9. During the exam, the doctor makes a decision about what the next step will be.**

Be decisive and move the patient to the next step while they're excited in the moment.

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**10. Doctor reviews the overall treatment plan.**

Refer back to the photographs, goals, and discussion points of the previous steps.

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**11. Doctor offers a positive statement, affirming the goal and vision will be reached. Doctor then follows by highlighting the “bad news,” but instills confidence by again focusing on the results. Doctor finishes by asking the patient what they’d like to see happen.**

Allow the patient reaffirm everything you’ve just said and determine their treatment plan.

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**12. Doctor asks the clinical team member to get the patient concierge or the treatment coordinator to come into the room.**

Doctor is handing-off authority to the clinical team member to form the Triangle of Trust with the next person.

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# Team Activity

## Step 2 Three Action Steps

Finish this activity by ensuring everyone on the team is unified on these three action steps. Discuss them together and write any decisions or agreements you'll be making as a team.

### Three Action Steps

1. Make 100% certain that everyone is clear on what exactly the doctor expects and what the protocol is for when they walk into the room for any type of patient visit.

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2. Make 100% certain that everyone knows exactly what the doctor's clinical exam order structure flow entails so that charts and notes are properly organized.

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3. Go over "next step options" and alternatives for every possible scenario so that everyone is on the same page based on the dynamics of a patient's diagnosis or outcome.

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