



Team Activity

Team Activity

Series 2 Advanced Training

Session 6 Treatment Presentation Experience (Part 1)

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

Team Activity

Step 1 Review

Before you role-play together, review the 10 steps of an effective treatment presentation experience.

The 10 Steps of the Treatment Presentation Experience

1. Review Goals
2. Lay Out Photos and X-Rays
3. Review Problems
4. Clearly Outline the Clinical Yes Agreement Already Made
5. Illustrate What that Means for the Pathway to Health
6. State the Investment
7. Always Position it as Good News
8. Insurance if Necessary / Applicable
9. Patient's Investment
10. Reduction for Full Payment Today and Asking for the Money

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Step 2 Role-Play

Partner up! Create small groups, mixing business team members and clinical team members.

Role-play together by presenting the pathway to health and closing the treatment plan.

Guidelines for this exercise:

- Make sure everyone gets a turn playing their role in the experience.
- Use triangles of trust.
- The team member role-playing as the patient shouldn't offer objections (this will be covered in the next Practice Focus).
- Help each other with verbiage, positioning, and process.
- Document your decisions on what each team member will commit to doing in every final triangle of trust, and, how you will communicate when the patient's ready.

Role-Play These 5 Treatment Presentation Experience Scenarios and Write Important Notes:

1. Same-Day Treatment (Immediate)

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2. Same-Day Presentation of Next Step or Phases

3. Same-Day Presentation of the Big Picture
