

PPA Podcast

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Creating Disciplined Days

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Kevin: **Good day, everyone. Welcome to the latest episode of the Dental Success Today Practice Profit Accelerator podcast. Scott Manning, welcome to the S-H-O-W, show, show, show!**

Scott: **Well, that's a new one. I like that. Kevin, thanks for having me and always organizing this, as we call it, the halftime. Usually, it's the halftime of the month, although we usually don't do it at the half point. This is the half point of the year, so this is the Profit Accelerator for the mid-year. We did a double whammy, June, July, back-to-back, one two punch, and now we get to set our sights on the future and all about creation. And specifically, I know you're going to talk to us about the number one most important thing in life, which is quality of communication and preparation. So let's do it.**

Kevin: **Yeah. Sounds good. Well, as you were mentioning there, Scott, today, I believe that it would be highly beneficial to continue our conversation from last month. So we started to wrap up the first half of the year. Now, we're kicking it off. So, as you stated, kind of bookending these things together here to give us this platform, because we want to keep building upon the assessments that we're making from all of our efforts, and the effectiveness of the first half of the year, with the intention of making smart adjustments. Remember, smart adjustments. Not adjustments for the sake of it. And/or additions so that we can have a strong second half, no matter where you are on the spectrum.**

So, where I'd like to begin is—and let's keep this broad and we'll dial it in—with regards to leveling up our communication and creating and executing on disciplined days. As you know, Scott, we talk about this a lot and almost joke about it, is how communication has always been, from day one, the number one area of opportunity for every team, every practice, in North America, and I'm certain, beyond. And I know there's countless ways that we can go with this. So, without further ado, why don't we dive in, and Scott, take it away, my friend.

Scott: **Well, first of all, Kevin, I appreciate the way you set it up. And you used my favorite word here. But I want to just talk about three elements of this. And this is not going to be new, and that's kind of the whole point. The whole point is that the daily disciplines are what lead to success. And in fact, it's often not the long bomb down the field touchdown or the one home run of the game. It's all the little things throughout the field of play that lead to the greatest victories, and more important, the consistency and that whole work smarter, not harder, idea.**

So to level ourselves up, we start with understanding that every day, I believe that the principles are, number one, to be prepared. You have to prepare for success. Now, most of the time, our preparation has to do with knowing patients, discovering opportunity, having a very organized, structured schedule for success. So you could make a list. You could stop right here, five minutes into this conversation, and if you did a team activity where you said, "What are all the ways that we could prepare for success?"

Scott: Room setup, daily flow, treatment plan completion. It goes on and on. On a phone call, we take a reservation fee or a prepaid or an evaluation fee, whatever, to set ourselves up for success. So in every instance, now, specifically today, we're talking about going into a morning huddle. It's not just about doing a huddle. It's about being prepared not just for the day but for the huddle, as example. So preparation is the responsibility of true professionals.

The second part is visualization. Visualizing the outcome. We call it maybe role-play, you run through the practice, all these things, and we're going to dive more into that in a second. But in the morning huddle, it's not transactional, just like our patient interaction isn't transactional. It's really got to be experiential in how we talk through what's supposed to happen. So, as example, a daily approach would be we're looking through the day in advance and we're not just having foresight, as in, see what's going to happen. Instead, we're having visualizing of the outcomes that we want to create. We are taking fingerprints to the day. And you're not going to do that in realtime. I mean, you can be so good and you can do it in realtime, but even still, even the best misstep. You're going to look ahead and you're going to engineer, and again, play out the way you want success to be.

So preparing for success, visualizing success. And then you must have accountability, all right? You have to make sure that at the end of the day, there is accountability to outcomes. And Kevin, I always say, "Who wants to be held accountable?" Well, I'll tell you. People who want to be successful don't need to be held accountable by other people because they care so much about the outcome that they hold their self accountable. Okay? And so I love accountability, responsibility. These are things that go hand-in-hand. If you are responsible, you have the ability to respond and control outcomes. If you're accountable, then you want to be a person who checks in on your work.

So that's the daily success system, not in tactic form, which we're going to get to, but in conceptual form. Be prepared. Visualize success. And then be accountable for what the actual results were. And then rinse and repeat. So I'll stop there, Kevin, and throw it back to you. You always make it much more tactical and tangible to drive results. But these are the things that nobody ever talks about. Anything short of these three things is just going through the motions. It's being reactive, versus being proactive to creating success on purpose. Success on demand is success by discipline. Kevin, are you there? Do we still have you? Am I lost? Are you lost?

Kevin: No, I think I'm here. Oh, you know what it was?

Scott: Okay, good.

Kevin: I was taking so many notes from what you said, I had myself on mute. Goodness gracious.

Scott: Oh, well, that's all right. That's good. Listen, I had to ask only because I'm so used to talking to myself and nobody answers back, so.

Kevin: I love it! Well, what I started to say there while I was still on mute was, I love all of it because it's in my nature to be a preparer, a planner, and sometimes I can be a little bit obsessive about it and I get myself in trouble there, and so I've got to find my own balance, too. Having said that, it's important for me to do my best, so I'm pulling this out of the practice, giving a different example about how it's important for me to give myself the best opportunity to be at my best in action every given day, rather than have my time of action: email response, phone calls, team meetings, whatever it is, where I have to think. What am I supposed to be doing? Where am I supposed to be going? All these different kind of things. Because it absorbs energy, it's distracting, and it takes away time that I could be using to spend more time with a person, more time with a group, more time so that I can have a better pace of conversation.

And so that's why I love how you go in your number one point of be prepared, and I wrote a whole multi-week series on this in my Thursday messages, because it literally will give you the platform to be a success, I find that, personally, in any given day. I mean, could you imagine... For me, I've got a schedule no different than a doctor, just like you, Scott, any of our team members. And could you imagine if I'm trying to figure out, okay, here's where I'm at. Where am I supposed to go next? Well, where am I supposed to be two hours from now? I'd be so worried about that stuff that it wouldn't matter.

And the reason why I spend a little bit of time on this is because, as you stated, we don't have to have accountability if we all take personal ownership to know what we're doing, have the plan in place, and then boom, we go execute. Then, when we don't have to communicate so much, is that now we just have to talk about the nuances that happen throughout the day in these last minute adjustments, new highlights, new information that comes to light. Patients are acting crazy today. Whatever the case is going to be. And so you can become more effective in communication by being prepared because you don't have to talk about so much in a given day.

And then the other thing that I wanted to just add onto from what you were saying there, because it does attach into the visualization, accountability. So we visualize, here's how I want the day to go. Right? That's the whole value based scheduling approach. We start with the anchor. We build our way through. By the end of the day, we should be easing into it if you buy into that philosophy and schedule in that manner.

Well, wouldn't it be wonderful if, at the end of every day, we give ourselves a grade on how we did with the schedule? Team, I know we're 10 minutes away from getting out of here, and here we are at our afternoon huddle. I wanted to let you know that I'm giving us a grade of 90% on our schedule today. We totally crushed it. The only reason we didn't get 100 was because we were so kind to get Mrs. Smith in because she was having an issue with tooth number whatever, and she was very grateful, even though it caused a little bit of a mess. She's one of our best, and so we were happy to do it. Wonderful job. And by the way, let me just point out to you the three reasons why I believe we got a 90% today. Boom! Let's recreate this.

Kevin: And then on the flip side, hey, we had a day, okay. I didn't even give us 50% today because it was a total mess. Here's why I think it happened. Let's try to avoid that in the future.

And so it's like this opportunity to be able, in a nonjudgmental, team-focused approach, to be able to hold each other accountable for whatever the mission is. I'm using "schedule" just as one example. It could be, hey, we had seven conversations about insurance today. We were six out of seven. Congratulations. I mean, play with it however you want. Whatever is most meaningful for you. Whatever are most frustrating for you. Whatever is the thing that you're highlighting that you're trying to work on to be able to elevate the experience you're providing, not just for patients, but for all of you as team. Because the culture we create is dependent upon how we communicate and how we prepare to execute in a way that everybody believes we have a favorable outcome. Otherwise, it creates angst, because now people want to start blaming each other, and that's no fun, and it's not even appropriate.

And so, Scott, I just wanted to share those few things in some specifics about these three topics, because, to me, again, as we speak about often, we can avoid a lot of the frustrations that exist within our practice if we just slow it down a little bit to do the work necessary to allow us to run at a pace that works so well.

Scott: Wow. Well, yeah, I mean, look, just really want to second that, and as I usually say on these, go back and re-listen. And if you play through each one of the applications that Kevin just gave you, what you find is you find de-stress. Right? You find not only slowing the pace down, but dramatically elevating your ability to stay in control. And when you stay in control, you're able to see things clearly. You're able to be more confident. And so, again, just like I went back to what can you...if everybody were to say, "How can I better prepare for success? In our practice, what does preparing for success look like?" Okay. You make it the list and then you figure out how to build that into your daily application. You do the same thing with visualizing in the morning huddle. Kevin has a great flow within the morning huddle step-by-step checklist.

The one thing that I would just add to Kevin's point of slowing down is that if we've identified that famous saying, "Begin with the end in mind." So in a daily flow, the begin with the end in mind is, obviously, hitting the four pillars. Proper, complete, comprehensive diagnosis. Presenting all the treatment all the time. Driving case acceptance, but following through. Those two things. Diagnosis, case acceptance. That leads to you must track those numbers. If you truly care about the patient relationship, you're going to monitor the data. And then you say the prepayment, collections. Well, these are the things that we have to really see clearly to slow down the pace, or we miss the most important points.

So begin with the end in mind. We know our targets. We can look at a month in advance and know exactly what we need to achieve on a daily basis in order to hit our goals. They say, "How would we ever not hit our goals?" It's only if

Scott: we get caught up in the busyness and get distracted from outcome-focused actions. Grab those three words, okay, and apply to every team member listening, to every position. And now listen to this, because this comes back to morning huddle: to every patient appointment. If we said, "What are the outcome-driven actions that need to occur in this appointment?" Photographs, updated x-ray, re-discuss patient treatment, go over a sleep study, an ortho presentation. Simply engage the patient. Congratulate on success and talk about a referral or a testimonial or a review. There is always an outcome. The outcome cannot be: the patient shows up. The outcome cannot be: what's already in the schedule. Those things are as good as done. It needs to be: what is next? Where do we go from here? How do we continue, evolve, elevate this opportunity to make an impact on a person?

So that leads us, then, also, outcome-driven, collections, value based schedule. And so then this whole idea of slow down, we're talking morning huddle, I think Kevin may elaborate, in the morning huddle, I like to say the advance strategy is not just what is each patient, most people just talk about appointments, not even think about patient. Maybe, at best, they review charts. Maybe, at best, they look at health history or they look at unscheduled treatment. And my famous line is, "It's not what's in the schedule, it's what isn't." It's not what's in the chart, it's what isn't. It's not what can we see in the mouth, it's what can't we see in the mouth. And there is all the possibility-based dentistry.

But the other place, though, is not just role-playing through outcomes, and triangles of trust, and clinical yeses. Technically, in the morning huddle, you should identify what's a clinical yes look like for every patient? What is the objective in our tag-team clinical triangle? Where do we need, okay, the front team, the business team, to help facilitate the exit triangle of the treatment summary triangle? So all of this stuff, it doesn't take more time if you're more poignant and you understand the purpose of the communication.

But the other place that I think Kevin really brings to light is slowing down. And we always talk about patient experience. We always talk about slow down conversations, slow down emotional connection, slow down so that you make complete triangles of trust to the business team. But also, at the end of the day, don't be in such a hurry that you leave loose ends. Don't be in such a hurry that you leave messes at the end of the day that are either going to cause confusion, they're going to case extra work on the backend, they're going to cause additional stress, additional work, all these things. Okay? Make sure that you close up properly at the end of the day, and that's that accountability piece. Accountability is, do we have integrity with what we said at the beginning of the day? Is every patient accounted for? Are there next steps in place for every relationship? Not treatment plan, not procedure, not appointment.

And, Kevin, one of the things, and then I'll throw it back to you, this shouldn't be surprising. The schedule is built out, and most people listening to this, a month, at least a month, but at the worst case, a week or two weeks. So there's no surprises.

Scott: Now, you're going to have cancellation, no-show, adjustment, people leave messages. Emergencies. But in the next 7 to 10 days, two weeks time, the schedule is already there. So if we need to prepare in advance, if we need to make adjustments or changes, we need to be out ahead of the calendar, ahead of the conversation, ahead of the appointments. And when we do that, that's what this bookending the day really is all about. And that's what takes a team to the next level is that we're not just dealing with spontaneity. We are structured, disciplined, we've controlled the approach to the day, and we have closed up the day properly to be able to compound and build. Kevin?

Kevin: Yeah. Listen, Scott, so much good there. As you say, stop here, rewind, listen to it again, because there's so many principles there that help to smooth out the days, create more consistency throughout the day. And just to give some specifics, Scott, you were alluding to this little structure, let's call it, to a morning huddle, and this came from, I've had this asked of my I can't even tell you how many times over the years. Most specifically, though, it was just a few weeks ago where a doctor came to be and said, "Hey, the morning huddles are going well. They're kind of off the rails again and we're back to what it used to be and people aren't as engaged, it's not as effective, the whole deal. And as a result, shocking, the days aren't going as smoothly. Maybe as well, financially, or whatever the case is. But it's just way more chaotic and hectic."

And so what I said is, I said, "Well, here's what I would do. And this isn't just for a morning huddle. This could be for a PM huddle. This could be during a lunch break. This could be whatever it is. Is literally come up with something that you believe is a, for lack of a better term, a script." Right? So I got these seven things that I'm going to get through in the morning in order to create consistency, number one. Number two, so I don't have to think, "What am I supposed to do again this morning? It's been a crazy morning, I didn't get a lot of sleep last night, I didn't have my coffee, and here I am and I'm supposed to lead the morning huddle I don't even know where I am." Okay, well, give yourself a guide to be able to give yourself the platform to be successful when you're not at your best. That's the purpose of preparation. That's the purpose of organization. That's the purpose of thinking through as many things as we can to set ourselves up for success, which, ultimately, sets up other people for success.

And so just as an example, I'll share with you, I said, "Hey, if I'm the doctor, here's exactly what I would do if I was leading the morning huddle. I would start out with something positive." Motivational quote. Just got to get people having their brains work as their friend, not as their enemy, because we're all bringing a bunch of baggage in in the morning. It's just a matter of to what degree. And then I would go to, "Okay, team, now we've done that. We're fired up. We're ready to go. We've swept away the cobwebs from the evening. Let's talk about what's the opportunity for the day? What patients are coming in, patients of record, who have treatment they haven't said yes to? Today's going to be the day we're going to get them to say yes." And then new patients. "Hey, let's make sure we all are aware of what new patients are coming in, when they're coming in, and what we need to know about that."

Kevin: Done. Okay. "Where are the opportunities in the schedule?" This is the one. This is the one everybody complains about. "Schedule's falling apart. Schedule's not the way I want it. Schedule this, schedule that." There could be more people that... If this is all you change, I'm going to show up every day... Since I'm the guy, I'm the king of the schedule. I'm going to show up every day and I'm going to tell you for the next two weeks, when do I have an anchor appointment available? What days do I need help filling? Effectively and productively, not just for the sake of it. And where am I going to slot emergencies for the day? Because we happen to get a lot of people who call for emergencies. Whatever that is. Where are my new patients going to go? Where are my opportunities?

So now we're all taking notes and we can be helpful. We can be a team together to guide patients into where that is. That's important information. Would love to know that. Have there been any changes in the schedule? Good to report on. "Today's a good day. Nothing happened. All right, team. Let's go get it." Done. 10 seconds. "Nope, this patient didn't show up." Or whatever it is. "Here's the changes." Or, "We're doing a new procedure." Whatever. Because everybody complains about that, too. "Well, something happened with the procedure with the patient." Well, it sure would be nice if we'd have known. Well, how are we not telling each other that? It's a little bit important stuff.

"Okay, team, any questions for today's patients? Nope? Okay. General questions? Nope? All right. Final words, here we go." Boom. It's not completely comprehensive, done, out the door. Everybody can customize it a little bit more. Yet it still gives the platform to be more successful, more in the know, connected as a team so that the patients have a better experience because I've taken the guesswork out of it and I've created a new habit and a new routine by simply doing something different, something I've adjusted, because, for whatever reason, this particular thing is not working out. How do I change that? And you can take that same principle that I've just described there and apply it to any aspect of your day. This isn't about a huddle. I hope you know that. I'm simply giving you a specific example, because we could do another one similar to that for the afternoon huddle, or whatever the case would be.

So, Scott, I don't want to take up too much time, because we are running up on the clock like we normally do. We always think, "Man, are we going to fill this 30 minutes?" And here we are, we could sit here for an hour! So I want to encourage everyone to do this. Here's your homework. Find a frustration point. Find a point that's a bottleneck and do this exercise. How can we better script it out, prepare, plan so that it doesn't happen again, and fix it, at least hopefully, fix it once and for all.

Scott: Wow. Well, Kevin, it's gracious. So I took a ton of notes from what you just said and I want to just piggyback on the homework assignment, because I think that's exactly the point, is Kevin's idea of how can we pick a frustration and unwind it. What I would just add to that is I gave you some preparation stuff and whatnot.

Scott: So one of the things we love talking about, which, by the way, goes straight into building complete health treatment plans. Excuse me. And that is, the best way to solve a problem is to prevent the problem. And so I think that goes with Kevin's point. So, what actions can we take to alleviate these kind of things?

And then what I want to do is just flip that upside down there and say, okay, not necessarily frustration. Do that. Do that, for sure. Now, let's back up into state of ideal. And then what I would assign as homework discussion for everyone here is say four things, okay? Number one, what is the most important way in which I contribute to our success on a daily basis? Now, if you're with patients... I mean, all of you are with patients. You're running patient clinical appointments. So in every patient appointment, but as a collaborative team, myself, what is the most valuable way that I contribute to the overall good? Because it's very usual that we get stuck in thinking about our role, our tasks, our stuff, and we forget about how all that weaves together into one integrated fashion. Which that's, again, the whole theme of this call.

The second step is, then, what do I own as outcome? So contribution could be responsibilities, actions, moving the patient through the pathway to health, screening properly on the phone. But then what is the thing that I tangibly own that ties into number three that I could report on? This is the outcome I own. How can I report to my team on this? Where is it at? How did we do? What's the future look like? Now, this might be easy if we're in charge of scheduling. We're value-based. Kevin's point of anchors. Here's records available. If we're clinical lead, maybe it's lab cases. Treatment coordinator, if it's hygiene, maybe it's my diagnostic opportunity in the next 30 days. Maybe it's certain metrics on procedures.

So, how do I contribute to overall success? Get clarity there. What do I own as outcome with my patients? What can I report on to my team? And then, lastly, what do I need from others? How can other people help you? What information, what support, what communication? What do you need from your team to help you do all the other stuff? One, two, three. And if you each assess this piece, you're going to take preparation, visualization, accountabilities to a whole new level. You're going to take Kevin's theme for today, which he said beautifully, "Leveling up our communication and creating and executing on disciplined days." And that's what it is. The discipline of the consistent high-level behavior and execution. So contribution, owning outcomes, reporting to everyone, and what do you need from other people to help you succeed. Kevin, I'll let you close this out, right up here on the minute.

Kevin: Sounds good, thanks Scott. And thanks for bringing it in from the forward-thinking part of this, too, because if we're looking at solving frustrations, challenges, problems that we have, in conjunction with being forward-thinking, state of ideal, how do we create the best of the best. When you combine those two together, it becomes super powerful and it gives you the opportunity to actually bring to life what it is that you would like.

Kevin: **And in the spirit of, we got a lot of Jocko Willink fans out there, he wrote this thing, a book called, "Discipline Equals Freedom: Field Manual." And he says, "The way of discipline, there is no easy way. There must be discipline. The way is discipline." And that's where it all begins.**

So if we all take accountability for ourselves, prepare a plan for the day, it gives us a chance to be able to focus on the three elements, the four pillars, all these different kind of things that we say, and you are continuing to create the most incredible dental or specialty practice on the planet, which you can be proud of because you're getting people happy, healthy, functional, beautiful, whatever you want to insert in there, and you can feel good about the work that you're doing. Scott, if you're still there, last final goodbye?

Scott: **Oh, no, listen, I had a quote today, Kevin, that says, "Success is the sum of small efforts repeated day in and day out." And this is at the end of the day the perfect quote for where we are and what we've talked about. So thanks everybody. Keep up the great work. This is the second half of the year. This is the new year inside of the current year, so you have a whole 'nother half to better your best, to double down, and to make magic happen. So go get 'em!**

Kevin: **Thanks, Scott. Thanks for being here, and thanks for everybody who's listened in. Go back, listen again. Take great notes. Most importantly, put it into motion. Create your destiny. That's what we're all about. So thank you, everyone, for listening in on the latest episode of the Dental Success Today Practice Profit Accelerator podcast. Have a wonderful month, and we'll talk to you again soon.**