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The Top Team Takeaways From Our Latest Live Event

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Kevin: Good day everyone! Welcome to the latest episode of the Dental Success Today Practice Profit Accelerator Podcast. The one, the only, Scott Manning, welcome to the show.

Scott: Kevin, yeah, listen, thanks for doing it, happy to be here. And it's just nice to have at least something that's consistent these days, so here we are. In this special moment in the year as we start turning into the vision of the new, or, and the spring, and the refresh, and all that. I don't think a lot of people are feeling it but some people are. But that's where we're headed. So it also happens to be, when we're doing this, deep into the final month of the first quarter of a brand new year, and that's a perfect time to take a little reflection point and see where things are and keep charging ahead.

Kevin: Yeah, I love it. And it's hard to believe that we're already saying that we are almost to the end of Q1 of this New Year. Wild how fast everything is going. And it just so happens that we have also recently completed another round of our powerful live training events in good old Nashville, Tennessee where we had another just, countless breakthroughs and commitments from all of our team members who showed up with their doctors. We're here to create the better future outcomes for patients, for team culture, and obviously, for ourselves. I thought it'd be good for you and I to take time, highlight a number of the key takeaways so that everyone listening can benefit, from those who were in attendance, as we extend that energy from everything that's going on right now in the DST Universe. So, Scott, if you don't mind, my friend, why don't you take it away?

Scott: Well, thanks. The first thing is we always love hosting people. There's just no way around the fact that when it's the day-to-day grind in the practice that meetings tend to be in the moment of time, right? They tend to be talking about or reflecting on what's happening in real-time. Most of the time it's even about the past, it's not even about the future, even when you do have a meeting. What we love with Nashville, and the way we've set it up, of course, is it sort of takes the inventory, checks in on the present. But really it's all about creating the future. As we always say, "creating the future."

I think I'll just start with two key takeaways. Whether you were there or not, I mean, we had our beautiful, first-ever, amazing Treatment Coordinator Mastermind. And then, of course, our Advanced sort of second step training evolution that's about the patient experience and psychology of case acceptance. So whatever the number was, 30 or 40 in total, or maybe 50 practices were touched in some way, shape, or form. So there's hundreds of others listening to this right now. The key points are the first thing I alluded to which is about what is the productive accomplishment of any engagement in a team meeting, in a morning huddle. In this case, even as a patient phone call or a hygiene visit, or a treatment presentation. We always need to have clarity over what's the purpose. What are we trying to achieve as a result of this? And that means that you have to be future-focused. And it also means you have to be looking one, if not three, steps ahead.

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Scott:

And so what I love about these meetings is it gives perspective. It gives everybody in the team an opportunity to have perspective of other people. So I just want to put this tangibly in your hands. So, first of all, let's start with the benchmarks of time. In a morning huddle it's about winning the day. It's about making this day more valuable by going through it than it was on paper when you started it. When you go into a patient visit the objective is, what's this leading towards? What's the next level of the patient's health? What's the next enhancement of the patient care? So everything, again, is about begin with the end in mind, sort of "future casting" if you will. Again, we start with this concept.

Then you go to, let's say, a weekly check-in. Now there's an end of day, obviously, that's reflective. That's a picking up all the pieces that's closing the loose ends. But then weekly, people can have weekly check-ins which...every team in the world has a weekly check-in. I can't imagine a team going week to week without checking in. But let's just say you have a weekly check-in, most people are diving back through all the shit that's happened. They're talking about all the problems or the complaints or the things that were missed instead of...it's a whole different energy, not to mention a creation as a catalyst, if instead you were pre-planning the week ahead.

So a weekly check-in is pre-planning the week ahead. And that's how "you make sure," not "you hope" when you walk into the morning huddle, but a pre-planning week ahead check-in. You make sure the clinical team has reviewed all the charts, you make sure that all the labs...Kevin, can you imagine that once in a while, even in our world, that there's still some discombobulation in the labs? How could this be? Wasn't it thought through a week in advance? So there should be no surprises. So then you go into treatment plans, formalized and ready for decision visits. Just again and again and again you go open time in the schedule. New patient consults or conference exams in place. So that's a weekly future casting of the point.

And then I could do the same thing monthly. Monthly's kind of a debrief of the month, but then it's also a moment to master the month ahead. So I say all this because when you have a training opportunity, you gain perspective from everybody to see just how in sync, or out, we really are. Just how aligned, or maybe out of alignment, that we might be. And the odd thing about success, Kevin, as you know, is you can do so many things right. But boy, one thing can be off and it can sabotage the whole deal.

And so to bring this back to your original premise, in one of the key trainings in Nashville, of course, it's really, it's all about this idea of the patient experience where each step is leading to the next step and everything is again forward, it's about making progress. So I'm going to stop there and see whatever you want to do with all that. And then the second principle, which we'll talk about maybe in the second half of the call, is just about expediting time. It's about how can we consolidate moments of time to make progress happen faster.

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Scott: And that could be closing a case, it could be scheduling an appointment. It could be, again, starting with this idea of begin with the end in mind, future casting, preparing in advance so that you can have more of the energy and effort allocated towards creation and making things happen, versus: clean up, checking in, having to deal with reactively what's already happened. So that's the big mindset shift. To me, that's what it's always about, but that's certainly what spring, the whole spring is about: forward. It's about forward. And so we need to make sure that in your life all the aspects of it are setting you up for that.

Kevin: I love it, Scott. A lot of great details there. I'm going to pull it back actually a little bit. There's a few things that came to mind as I was listening to you describe all of that in detail. We have this concept that we talk about on a regular basis, which everyone has heard us say before, is, "Every patient, treat them like a new patient." See them with a fresh set of eyes. Regarding the Nashville event, or any time that we would spend with you, time that you spend together, is do that in the same way for yourselves. In other words, hear information, hear concepts, ideas with new ears. In other words, don't judge what was previously done before because you're in a different place. You've made progress, you've taken steps. And so this idea of fresh, spring, anew, renewed, all these things that we're sitting in here, it also comes from reminding yourself to hear things as if you've heard it for the first time; because that's where interesting ideas come from, fresh ideas come from.

And it goes with this other concept that I want to share. Maybe people haven't heard of it before, or they have just in a different way. When we talk about making progress and then hitting this point where we have a breakthrough, and we use those words often, it's because we get to this state where we're in a rhythm, things are pretty "simple." In other words, we do the same thing over and over and over again and it works to some degree.

Yet if we take a step back and we look at it we're like man, we're working harder for the same results, we're putting more energy towards it, we're just...it might even be taking you longer to get somewhere. And that is a sign that we've reached a point where we have to pause and we have to open it back up and look at things, hear things, experience things differently because now it's time to create a new, simple. It's time to create a new pathway with regards to where we are going. Because if we just keep hitting it, that's where frustration mounts. And I think a lot of people don't recognize that. It's actually a sign that it's time for something to have fresh breaths breathed into it.

And so I know it's a bigger, broader topic, Scott, from where you were. Yet I want people to actually be excited during these moments where it can feel mundane, where it can feel frustrating, or whatever the case is. Because that's what the Nashville experience reminded me of when we hosted so many people this time around, is you could just see the enthusiasm because they looked at it, they heard it differently. And that's one of the beauties, as we tie this into spring, is because spring gives us a chance to do it all over again.

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Kevin: New life, new energy, the whole deal. And we get to look at it completely uniquely than we had the season before.

Scott: Beautiful stuff, Kevin. Thank you for always making it more approachable and applicable. So let's just start with, I mean, what the hell? Let's just start with, so seriously, okay, you should have a checklist. And if you don't it's okay, let's make one right now. That what do you do every single year in your practice in March and April? Pull it out and what is it? I mean, it might be as simple as we do carpet cleaning in the reception area, okay? It might be, you should have flowers all year round, but literally have some live stuff in the practice so there's that feeling of living, okay, and breathing things.

But what is the checklist? It might be that we deep dive the patient experience and we just see, where are the little touch points or nuances where you have, again, this fresh perspective? It might be that it's the annual spring... Kevin's the baseball, he's the master of the baseball things...it might be the spring training where you're like "Okay, everybody does an assessment checkup." Not just HIPAA, OSHA, I'm talking about is everybody up to speed on all the new technology. Maybe we have even new team members in the past 12 months and are they fully indoctrinated, up to speed with all the protocols and the tiers of advancement? This could just be that spring-cleaning idea. And it's so important that we have a moment to really assess, take inventory, and then refresh. And you want this invigoration. It gets so easy to get caught in the daily grind.

Now, I want to just dramatically and abruptly shift gears, also, over to the obvious which is this same concept needs to be applied to your patients. Every single person you see, I don't care if it's in the specialty realm where sort of every patient is a new patient, and yet even still, the majority of opportunities of enhancement of treatment, and selling, and referrals, and everything else come from patients in treatment or patients exiting or completing treatment. But in our traditional form of practice where we treat every patient like a new patient, no matter how many times they've been there, that's the whole point of the fresh eyes mentality that we teach and really what we stand for, is giving every patient the best you've got every single time you see them.

So if we go back to some of the things that Kevin and I have been talking about for really a few months sort of building up on each other is begin with the end in mind with every patient encounter. The phone call to an appointment, the intake to the comprehensive exam, the conference exam to a decision visit, or a full-blown laying out the complete pathway to health for the patient. And getting in the habit of pre-framing the patient with where we're headed, what success looks like. And ideally making it collaborative which is what the Nashville Advanced Training is all about, but making it collaborative where, we can't have a destination without defining success in the first place. And never forget what I just said, there is no destination, we cannot arrive at a place, without first defining what success looks like; before you even get started. It goes for every single team member at every point of contact or communication or engagement with the patient.

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Scott:

So I could go over that, and Maegen and Kevin did a beautiful job with all this, but on the phone, beginning with the end in mind. What success looks like, the patient's first visit, second visit, and third visit.

And one of the things to that Kevin and I wanted to address today was closing the gap on where a lot of times things get left in limbo, they get left in indecision, they get left in thinking about it. And I really believe, Kevin, it'd be great to get your take on this, all success comes from alignment of expectations. And when it comes to a relationship, there's really no way for it to go awry—now you have to deliver on the expectations—but a lot of times people fulfill and deliver, but there's disappointment even still, because there wasn't first this alignment of expectation.

And so you have to have that with your team, with each other, with departmental responsibilities. Obviously, as doctor, leader, all these things. And so often people lack clarity over what success looks like. A misalignment of expectations. If you just said, "We're going to just spring-clean that whole deal up." And we were more—and we talked about this in January and February—we're more bold, and clear and definitive with who we are, who we're for, what we're about, why we exist, what do we do here. And we proclaim that to the patients.

But if you could boil that down into a stump speech that you can give to every patient whether you're on the phone, whether you're the lucky one dealing with some insurance stuff, or whether you're a clinical team member on either side of the practice: if you could have that speech for every patient so that you were customizing it based on the individual, but always beginning with the end in mind, always stating clearly. And then engaging in what success looks like and aligning expectations, getting patient feedback so that we're clear. That to me is the thing that can, more than anything else, accelerate progress. Because if people have clarity of the destination of success being well-defined, then really you can cut through a lot of bullshit, okay? You can not necessarily skip steps, but you can keep the momentum going through these steps. And it's no different than presenting complete health dentistry and getting the patient to buy in on the ultimate vision, versus, want to do pieces and parts, steps and stages, along the way.

We could do an entire discussion around spring cleaning, the whole verbiage. But really it's about, and goes back to, are we making space for the opportunity to help other people? And then are we clearly aligned on that mission and the expectations, both with our team members responsibilities, as well as the patient's objectives of where we're going? Kevin can maybe clean all that up and make it a little bit simpler.

Kevin:

Yeah, wow. I had this vision in mind as you were describing all of that. And the one thing that I find interesting, Scott, is how often even some of our best... where we're not in complete alignment with a singular mission. Because as you know, the thing about me is I've always worked as hard as I could to figure out how to do everything in a simplistic way, which is complex, it does take time, a lot of trial and error, in order for the simplicity to lead to relatability

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Kevin:

with other humans. And then it makes it also easier to be able to replicate on a regular basis. That's why simplicity to me is always the goal.

Even distilling it down to one single mission statement that everybody can say to every patient along the way so that they see that we are in complete alignment and that the decisions that we make, the recommendations that we offer, the encouragement that we give, the fight that we do to be the conscience of the patient for their health decisions, all boils down to this: we are here as a team, individually and collectively, to get you to the most optimal state of health that we can. And how we do that is by customizing the journey, by meeting you where you're at as a patient, and us showing you the way.

It doesn't have to be that—the point being is that everybody along the way can say that. I'm saying that as I'm screening a patient on the phone having that first phone call. I'm saying it in the hygiene department, I'm saying it as an assistant, I'm saying it as a doctor, I'm saying it to everybody along the way. To the patient it's, "Holy cow, man, these people are...they really do have their stuff together." Because the patients are always looking for the cracks, they're looking for the gaps, they're looking for the misalignment because then they use it against you. "Well, this person said this and this person said that. Well, that doesn't really match what you guys say." And that's where they get you caught in the trap.

I'm certain that there's people out there, "Oh gosh, we get it, Kevin, we get it, Scott, we understand." We're not here to have you get it, we're here to have you live that so that it's actually easier for you. So when doctor says it, and then assistant says it, and treatment coordinator says it, it's, "Holy cow, they really mean business here." And that's why we're different.

The thing that you said, Scott, that hit home to me is that we always have to remind ourselves, we have to define, put vision to it, so that we can all see where we are headed. What is the definition of a patient who has successfully achieved an optimal state of health? And what steps along the way did we have to take to ultimately get there? Because in the end, as you stated, to create success, as you defined, it does take complete alignment. Anywhere we're out of alignment it's going to blow it. Alignment of verbiage, a misalignment of energy, a misalignment within our communication.

And the final piece that I'm going to reaffirm that you talked about, Scott, was about expectations. I think this is definitely one of the top five areas where we lose opportunity to have the patient stay connected with us all along the way. Because at each stage we have the opportunity to remind them of what's going to happen next, what our expectations are of them to be a patient, to earn the right to be in our practice. We have to earn the right to care for them, we have to earn the right for them to believe we are the solution for them.

And then they equally in return have to earn the right to be your patient, to take a seat away from another who is willing to make the commitment to get to total health. Whether they do that in a day or a year, I'm not here to judge

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Kevin: that, because that's what you all do clinically, at meeting the patient, customizing the experience, the pace, all those kind of things. I get so fired up about this one because we tend to forget and get lazy about constantly resetting and casting the vision of what expectations are.

Scott: Wow. Let's just play that out for a slight second here. Let's elaborate and say, "This means that if we do such things, then we no longer have to be bashful in any way about what we're doing." If the patient has given us an agreement, okay, this is the clinical yes—but let's skip, let's go in advance of and then past the clinical yes—if the patient has given us an agreement on scheduling appointment and what they want to accomplish during this visit, okay, if they've given us an agreement on what we say we're going to do during this visit, and, does that meet their vision of it, right?

Kevin, you say this all the time, I think Maegen says it, I say it, the patient is not being forced to come in, the patient is voluntarily arriving. And so the only difference between, I'm voluntarily arriving at your practice, I'm sitting in your chair, again not by force, I'm going through this exam, again not by force...all these things...the only difference, the only discrepancy possible is expectations. If those are aligned, and the patient is then doing everything voluntarily, then by definition and by behavior we have full permission to do what is in the patient's best interest, as facilitating successful outcomes.

And that brings us to really, I think, where we're going to pick up next month. But that brings us to every team member helping that patient through whatever the finish line, which there really isn't a finish line—the finish line of their part of the experience. Again, we're doing a verbal synopsis or summary of what our Seven Steps of what our Advanced Training is all about. It's really not like a checklist, it's really, it's almost more principled in the fact that you have to help the patient through and keep the continuum going.

And I know next month we're going to do this, but we're going to give one simple example of...a treatment coordinator who gets a patient all the way through a clinical, yes, the presentations of all the stuff, and then we end with a, "I'm going to think about it," or something like this. And so we're like, "Okay, well, if you're going to think about it, so what does that mean?" Well, most people default to, throw up their hands and let me know when you're ready. Is it okay for me to follow up on you? Well, you have to realize, we've already gotten permission because they showed up! And so we constantly go with this bashful, timid, almost pandering, and passive approach, when in fact—and boy are we going to leave them hanging on this deal—but in fact, it's supposed to be strong, facilitated leadership and maintaining control. And the only way you can do that, the only way we can help a patient truly to their goals is if we've aligned it properly on the front end.

I think before we go to the back end, Kevin, we'll just do the summary of the front end. So today we've given you so many things to do a spring cleaning check-in on, an assessment, over the health and well-being of every team member, over the impeccability and the effectiveness of their performance and skills over the alignment of responsibilities and vision: both for each other

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Scott: and for patients. And then the question is, what's a refreshed, renewed sort of view, and look, and touch, and communication, and relationship look like for every aspect of your practice, every one of your team, every department, and role, and the patient experience as a whole?

And then let's really do a deep dive on, are we verbally communicating and are we behaviorally, okay, implementing what a clear definition of success, alignment, and expectations looks like? And then if we are, well I think, Kevin, next month we'll show up and we'll help people, okay, drive better results and more consistent outcomes with patients by making sure that we're doing, perhaps our two favorite words, called, "follow up and follow through," okay? Because this is about you controlling the finish, you being able to deliver on outcomes, not leaving things up to chance. And that requires you stepping up, taking ownership, leadership, and responsibility, over, ultimately, the end game here. Which is what we're doing, what we're making happen, what we're successfully creating within our patients: how many people are we getting healthy and to what degree and value? So I know I talked us out of time. Kevin, I'll throw it back to you and maybe you can punch out a couple action steps, and we'll pick up next month maybe on the flip side of all of this.

Kevin: I love it. Great discussion as always, Scott. So many takeaways and areas for every one of us to be able to take a moment of pause, assess what's happening; it's not about blowing it up and starting over, it's about finding a key leverage point, maybe two, maybe three, that's it!

And then we keep going. We keep resetting our goals, we keep resetting our expectations, we keep resetting our commitments, so that we're making the progress. That we are working towards helping more patients get further along in their health journey because it takes "refresh" and "renew" in order to be able to do that.

Wonderful discussion today. Scott, thanks for being here with us. And everybody, thanks for listening as well. We've already got a wonderful episode mapped out here by Scott at the end that's something to look forward to. So, Scott, thanks for being here, my friend. And everybody else, thanks for listening in on the latest episode of the Dental Success Today Practice Profit Accelerator Podcast. Let's make it a great month until we're with you again.