



Practice Focus

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Series 3 Team Mastery

Session 1 Making Old Patients and Treatment New Again

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1. Listen to the audio recording.
 2. Follow along with this transcript.
 3. Use the transcript to help complete your Team Activity: **key points are highlighted.**
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Hello everyone and welcome to one of the most important Practice Focus sessions you will ever have. Today, I'm bringing you the ultimate secrets to ensuring you continue to grow your practice, and you are able to continue to bettering your best and hitting new records, higher bonuses, and most of all, helping more patients.

What is the difference in practices that look nearly identical in number of team members, operatories, working hours, on how one practice may be stuck striving to break \$100,000, another \$200,000, and yet another \$300,000? A month, I'm talking about, in collections. Of course, it always comes back to your effectiveness at six growth and success metrics that every practice shares. Obviously we're talking about **the amount diagnosed, the amount accepted, the amount collected, the number of new patients created and scheduled**. That can be from phone calls, referrals, from online sources, anything and everything. Referral sources externally, it doesn't matter. And also, we have to make certain that you are ensuring every patient leaves with an appointment, some next step.

Now depending on the type of practice you have, is to what that appointment may look like or vary, but there has to be every person in the office, every day, accountable for whatever's happening next. Then the result of this, of course, is your **production number**. Too often practices making production the primary focus without realizing that it is the effect to the cause, thereby putting it as your primary focus, you by default have zero control over it. It is only when you structure your focus in the hierarchy that I have outlined that you will be able to predicatively control and orchestrate your production to be whatever you want it to be. There are, of course, scheduling strategies for advanced practices that we'll get into coming up in a couple months that will help you break through any plateaus.

Today, we focus on creation. You have role-played and mastered your patient experiences from every possible angle and interacted vantage point with every team member and every type of visit. Now all that is left to do is to do a better job of discovering opportunities in ways you can help your patients get healthy and compel them to move forward. At the very basic core, we look at gums and teeth and bite and smile and airway and to each their own clinical philosophy that will dictate your procedural approach and order of priorities and objectives. The bottom line is, if you don't diagnose it, it can't be done. If you don't give the patient a chance to accept, then they can't say yes to it and therefore, you leave them at a disservice.

When it comes to diagnosing, the biggest challenge I hear every day is about **patients who have had pending treatment for a long time or patients who aren't interested anymore**. I say to that, first, if we go back to the very beginning in our original agreement, it is to always **treat every patient like a new patient** and to commit to showing your patients the big picture of how dentistry truly fits into their life, their mouth, and your relationship of the ways you can help them. That means every single time, no exceptions.

Let's review the basics. Number one, you want to know at the beginning of every day what the **opportunity** is, the unscheduled treatment, the recent conversations, the interest of every patient you will see. Number two, you want to **engage** each patient with the **treatment opportunity** earlier in their visit so you don't run out of time. Number three, you want to **prepare and educate** your patients to be set up properly for when the doctor comes in. Number four, you want to execute a thorough and energetic **triangle of trust** with your doctor.

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Now four very simple fundamental principles. Know what's going to happen today, make it your priority in every patient appointment, prepare that patient for the doctor, and then execute a beautiful presentation to your doctor so that they can move forward with the diagnostic acceptance and the clinical yes.

Now in order to do this, you want to **never take anything for granted**. You simply never know when a patient is going to be receptive and ready and you never want to bypass any discussion because the smart patients will wonder why it was so important before but isn't important today. You want to use your personality to engage either in a fun, in a serious, in a lighthearted, in a direct and blunt way based on you and your relationship with the patient and how you believe that patient will best react to wanting to move forward with the overall treatment.

Of course, depending on if you're doing more general dentistry, cosmetic dentistry, full mouth dentistry, we hope, or you are specializing in a certain type of practice, you will have different discussions and points you will want to get across. Or our specialists, you may only have one chance with your new patients and the same steps apply. You just have to secure some next step with your patients today because you may not get a second chance with them incubating in hygiene. I see all too often that practices have one extreme or the other, low diagnosis with high case acceptance, doing one tooth insurance based stuff at a time. Or they have high diagnostic number but low case acceptance because they aren't telling the full story again with every patient. Documenting numbers is not the point. Engaging your patients is.

By the way, when you see a day without a lot of opportunity, it's most certainly not because every patient has been completely restored and taken to a state of ideal, optimal health and perfect mouth. You wish you were that good. It's because there have been things missed, conversations not had, pictures not taken, diagnostics not done. Remember, there are always patients who need **updated photographs**. Remember, there are always patients who need **updated comprehensive exams**. Remember, there are always patients who can use **ortho whitening smile makeovers** and so on and so forth. Always ways for you to help people.

Your responsibility is to give your patients a chance to say yes to what they truly deserve, not for you to try to make up their mind for them. Besides, every patient can be a source of a new patient by way of referrals and word of mouth and friends and family. Even if there is absolutely nothing for you to do with them, then you can have them help you do something for you. Today, this month, and really every single day and month going forward, I want you to take literally my principle of make old treatment new treatment all over again and make old patients, when necessary, new patients all over again. Work to expand your diagnosis and value of treatment available to present. Old treatment is made new when it is a **new discussion**, when it becomes timely and relevant, when photographs are updated. **Old patients make new patients again** when they go back through comprehensive exams and when you are working your expired exam and inactive patient list.

Rest assured though, I'm not talking just about people who are inactive. I'm talking about people you see every single day. I 100% can prove in every column of hygiene, every single day in every single practice, there is a patient who would benefit from starting over again simply because one, you get better. You're better. Your new patient experience is better than it's even been before. Two, you're diagnosing more comprehensively and thoroughly than you ever have before. Three, obviously, the patient changes over time. They may be ready for

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something different today than they were x number of years ago. There is ample and abundant opportunity inside of resources you have already got as long as you will take the initiative to do something with them.

Today, I'm giving you five things to assess and act on, five important, very deep and special things. That's why we call this the Advanced Practice Focus. First of all, I want to know how well you're doing at the six metrics. Average, daily, and weekly diagnosis. What is it? Then I want you to divide the number by the patients you see on average and find out how you're doing per person. Then you're going to find the average daily and weekly case acceptance. Again, divide by the number of patients you see and figure out your average per person.

Then you're going to figure your average daily and weekly collections and ask yourself if you're doing enough to get more cash upfront. Then of course, you're going to go through the average daily and weekly scheduled new patient numbers. You're going to ask yourself, are you tracking phone calls and comparing the results of the number of calls to the number of appointments? Then you're going to go through the average percentage of patients every single day who have treatment, that scheduled something and moves forward, or that you're missing, any patients daily that fall through the cracks.

Finally, you're going to go through average daily and weekly productions and you're also going to look out how far you're scheduling into the future. Depending on the style of practice, you don't have to be scheduled far into the future. What you do need to do is you need to average the productions to hit your goal. If that isn't happening, obviously you're doing something wrong on the numbers leading up to that one.

Now through these six metrics, we have touched every single person in the practice. We touched our amazing clinical team to the diagnostics, to creation, the education. We touched our hand-offs to the clinical yes leading up to case acceptance with our average values of treatment that's accepted. We touched our business team for securing large appointments and big dollars upfront. We touched on our phone team with the new patient incoming phone calls. Ultimately, we're touching on the overall practice, their ability to manage value based scheduling and to solidify the high dollar productions per day so that you can exceed your objectives.

Now assessing these numbers tells you how well you're doing at all the things you've been working on up until this moment in time. Our objective is to set new goals, new benchmarks, and find out what we can do to push the envelope. Every number should increase. Every average should increase. That's what we're here to do right now.

Second activity: in what ways can you better execute on presenting more treatment to patients in an effective way? Where are you not executing photographs, having proper discussions? Where are you not prepared in advance for your patients? You can listen to this Practice Focus again and really dial in on point number two and what ways you can better execute on presenting more treatment to patients in effective ways. Share, advise, give suggestions to each other. Number three, are you making old treatment new again? What can you do better? Simple idea. Make sure you're doing it. You'll be amazed. You'll be amazed at what will happen. Number four, are you actively making old patients new patients again? What can you do better?

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Now, to bring this full circle, the first one, you may need to take some time. Some of you may need to work on these numbers and pay attention. Depending on how much you're following the bucket structure, you may need to go searching and calculate these numbers for activity number one and then discuss them at a subsequent meeting. Numbers two, three, and four you can immediately discuss and everybody come up with the principles and the protocols necessary to improve each of these items. Better executing on presenting treatment, making certain that we're making old treatment new again, and that we're actively, through all sources, I gave you four or five really big ones just today, of making old patients new patients again.

Fifth and finally, I would like a list of the commitments you can make as individuals and overall as a team to make certain you are focused on the highly leveraged possibilities and you're holding each other accountable for presenting all the treatment all the time and giving every patient the best chance at saying yes. If you want to increase your numbers and help more people, you must go to work on all of this right here. You have worked so hard and diligently on the triangles and on your communication. Now it's time we've become creators and be on a journey of discovery, an expedition, to help your patients like never before.

I'm challenging you to have tough conversations, to stay focused, to expect more out of yourselves and therefore, your patients, and you will be surprised, I promise, what your courage and conviction, to borrow from Kevin's favorite words, and your confidence and your energy, your attitude and your expectations will do to your patients' willingness to move forward. We're continuing to get very deep and very advanced to high level work here. Please put the effort in that's warranted in assessing reality and taking control over your results and your patient outcomes.

Of course, we do all this because every patient counts. So you must make every visit matter.