



Team Activity

Team Activity

Series 3 Team Mastery

Session 11 How to Achieve Your Goals by Controlling Outcomes and Being Proactive

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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

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Email
Champions@DentalSuccessToday.net

Team Activity

Step 1 Review Last Month's Commitments

Before beginning this month's activity, briefly review last month's.

Reflect on your two commitments from the end of last month's Practice Focus Team Activity.

Your commitments came from answering these two questions:

1. When it comes to creating consistency on an individual level, what's the one commitment you'd like to make to yourself?
2. When it comes to creating consistency on a team level, what's the one commitment you'd like to make to yourselves and your patients?

Give yourself a quick assessment:

On a scale from 1 - 10, how do I feel I've done at fulfilling my first commitment?

On a scale from 1 - 10, how do I feel I've done at fulfilling my second commitment?

Is there anything I can do this month to further realize my commitments?

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Step 2 Key Points

This month we'll be exploring how to take control over outcomes. Most practices never move past accidental success, simply hoping for good days.

Together, we're going to discover how to cultivate a more proactive approach to success.

Here are the four ways you can set yourselves up for success beforehand:

1. Leveraging Your Schedule
2. Daily Huddles and Winning the Day
3. Being Proactive With Patients
4. Being Proactive in Relationship With One Another

Leveraging Your Schedule

Every decision you make right now, every dollar of diagnosis you're placing into your schedule, has implications on your future.

If the day, or even the hour, hasn't passed yet, it's still under your control.

You want strong anchors as far out as you can get them, but you have to manage these small things throughout the day to make it happen:

- New patients are free-flowing and not booked out to the point where nobody can get in.
- Blocks aren't collapsed to the point where the doctor can't do a thorough job of diagnosing new patients.
- Treatment conferences and how quickly you're turning those patients over is monitored.

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Daily Huddles and Winning the Day

Philosophy on Winning the Day

We out-diagnose our goal... to get case-acceptance at least equal to our daily goal... and strive to out-collect our production.

Philosophy on Daily Huddles

This is the space and time where we bring our day to life.

How to leverage your Morning Huddles:

- Review charts.
- Highlight where your greatest opportunities are coming from.
- Strategize what will help these opportunities become reality.
- Visualize them coming to be.

When you're simply stuck in the rat race of chasing production dollars, you lose your control and end up with very difficult ups and downs.

So, your approach needs to be deliberate from the get-go, knowing that you'll never get more case acceptance than the treatment you present, and that you'll never present more treatment than you diagnose.

Remember

Start with the big picture and reverse-engineer the results you'd like to have.

Being Proactive With Patients

Success in your patient interactions all starts with your expectations and your positioning. Your expectations of your patients and positioning to them should always be about taking just one step at a time. Your goal is not to convince patients to agree to everything all at once, but to be making consistent, meaningful progress.

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Your conversations should simply motivate a patient to be interested in the next part of their experience.

Here's the step-by-step flow you can apply to your patient experience:

Phone Call → Appointment

Appointment → Diagnostics

Diagnostics → Belief

Belief → Discovering Value in Investing

Discovering Value in Investing → Timeliness of Completing the Procedure

Being Proactive With Each Other

You can't be controlling the future if you aren't solid on the ground as a team.

The Golden Rule

Treat your teammates how you want to be treated. Success requires this level of commitment.

Being clear with each other is an act of kindness. In an effort to perpetuate kindness and unity, here are some places to start together:

- Who owns what?
- Who does what?
- What checks and balances are in place?
- How are you staying ahead of your goals?
- How are you setting up the next teammate in line for success?

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Step 3 Solidifying the Four Corners of Your Practice

It's time to dive further into the Key Points listed in Step 2.

Engage in team discussion and distill the concepts within the Four Corners into specific, actionable steps.

Here are the Four Corners of Your Practice:

1. Leveraging Your Schedule by Controlling the Future
2. Embracing the "Win the Day Philosophy"
3. Being Proactive With Patients by Clearly Walking the Pathway to Health
4. Being Proactive With One Another by Clarifying Roles and Objectives

Leveraging Your Schedule by Controlling the Future

On a scale from 1 - 10, how well do you think you're managing your future schedule?

When's the last time you've discussed how you schedule your future out?

Example: this quarter, last six months, last year, or longer.

Who's in charge of monitoring the future schedule on a daily / hourly basis?

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Does this team member(s) or any other team members see opportunities for creating efficiency, removing stress, or generating more revenue via simple schedule changes?

If so, what are they?

Who's going to take responsibility for what and ensure these changes happen?

Embracing the “Win the Day Philosophy”

This is where you pave your path to success through reverse-engineering.

Start with the big picture and determine what has to happen for each and every team role / team member to achieve your team's diagnostic, case acceptance and collection goals.

Write your roles, teammates within each role and specific metrics that get you to your goals.

Note

These metrics should be easily reviewable and measurable, whether looking at a sample size as small as a day or as large as a year.

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Write your team roles, team members and metrics for success.

Being Proactive With Patients by Clearly Walking the Pathway to Health

To review, here's the sample step-by-step flow for patients in your practice:

Phone Call → Appointment

Appointment → Diagnostics

Diagnostics → Belief

Belief → Discovering Value in Investing

Discovering Value in Investing → Timeliness of Completing the Procedure

Referencing that step-by-step flow, does anyone have any ideas for tightening up verbiage or handoffs within your patient experience?

Here are two great places to start and get the ball rolling:

Share a recent success.

If someone recently used a new phrase or technique which successful got a patient from one step to the next, share your story amongst the team!

