

Team Activity

Team Activity

Series 3
Team Mastery

Session 8
Mastering the Art of Case-Building and Getting Buy-in and Involvement From Your Patients to Increase Case Acceptance on Comprehensive Treatment (Part 1)

Listen Online
dst.media/focus32

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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.

Send Us Your Master Worksheet

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615-807-3301

Email
Champions@DentalSuccessToday.net

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Team Activity

Step 1
Review the Fifteen Components

In this Practice Focus, you'll be exploring the fifteen components to mastering the art of case building and getting buy-in and involvement from your patients to increase case acceptance on comprehensive treatment.

You'll be engaging in discussion as a team and brainstorming within each of these components, but first, take a moment to reacquaint yourselves with them:

1. Pre-Framing
2. What Are We Here to Do?
3. What Are Your Goals and Vision of Success?
4. What Else?
5. Building Rapport
6. Layers of Health
7. Tools to Use
8. Origin of the Problem
9. Why Something is Happening
10. How to Fix It and Prevent It
11. What Do You Want to Do, See Happen, and Go From Here?
12. Establishment of the State of Ideal and What Optimal Is and Looks Like
13. Avoid Dumping Diagnosis
14. Talk From the Pictures and Models and Apply It Back to the Patient
15. Commit to Every Transfer and Handoff Being Done Verbally and With a Triangle

Team Activity

Step 2
Guided Team Discussion

You'll be engaging in guided team discussion for each of the fifteen components.
The discussion format for each component will be identical, helping you to get into a rhythm of inspiration, as well as making it easy to identify clear, specific, meaningful commitments together.

Your team discussion questions move from "general" to "specific."

Here's the format for each component:

"Where do you see opportunities to improve this part of you process?"
General... anyone in the practice may have the floor first.

"Of the opportunities you identified, which team roles are directly responsible for this ideas becoming reality?"
More specific... again, anyone may speak first.

"For each role you listed, write the name(s) of those in it and what commitment(s) they can make to better that component of your experience."
Most specific... allow those directly affected to speak first.

Remember
Everyone's perspective is valuable and you're all here to help each other be the best you can be!

Now let's get to it!

Team Activity

Component #1
Pre-Framing

Quotes from Page 2 of Your Transcript

"...pre-framing is for every type of patient experience..."

"Pre-framing is talking about the point and the purpose, why they're here, what our goals are to achieve. It's setting the patient's mindset to understand."

"Pre-framing is all about language and creating a mental visual picture in the patient's mind."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

Name(s) and Role:

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Team Activity

Component #2
What Are We Here to Do?

Quotes from Page 3 of Your Transcript

"...make sure that you're clearly and proudly standing before the patient, telling them what we're here to do and what our role is in our patients' lives."

"Every patient in our practice, we want that healthy mouth: one that functions properly and has a beautiful smile."

"We need to ask ourselves, are we clearly stating and defining to the patient what we are here to do?"

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

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Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

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Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #3
What Are Your Goals and Vision of Success?

Quotes from Page 3 of Your Transcript

"...are we making certain to ask for and get patients to articulate their goals and vision of success?"

"...you're going to follow up in almost every case with the goals of the patient."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #4
What Else?

Quotes from Page 3 of Your Transcript

"You're going to follow up with what we call the 'what else question.'"

"What else would you like to see happen with your smile?"

"What else are you concerned about with your mouth?"

"What else is standing in your way of moving forward to treatments?"

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #5
Building Rapport

Quotes from Pages 3 and 4 of Your Transcript

"Rapport is designed around the idea of developing trust and what we call affinity. Affinity is that people like people who are like them..."

"...rapport is finding some commonality in the patient that you can share..."

"...if you do a great job, you will have built rapport throughout the entire experience and handed that off to your next team member in line..."

"...for every team member, it's good for you to have your own personal rapport with the patient..."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

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Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

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Team Activity

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Team Activity

Component #6
Layers of Health

Quotes from Page 4 of Your Transcript

"...when you are treatment planning, which comes first from diagnosing, you have to create the layers of health. By doing layers of health, you're helping the patient to understand the way the mouth fits together so that you're not just thinking about the specific problem or tooth or diagnosis to procedure, but we're actually building, again, I say the word, a vision for the patient."

"...it's every team member's responsibility to constantly educate and bring to life the layers of health in your practice philosophy of what you do."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

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Team Activity

Component #7
Tools to Use

Quotes from Page 4 of Your Transcript

"...make sure that you are utilizing the tools you have available to yourself. And this is using the patient's mouth as the example."

"...use all the technology necessary, whatever is going to help bring this to life in the patient's mind to create layers of health."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #8
Origin of the Problem

Quote from Page 4 of Your Transcript

"...you want to bring the patient full circle to what we call the 'origin of the problem.' This is simply saying why something is happening."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #9
Why Something Is Happening

Quotes from Page 4 of Your Transcript

"...four key pieces are tied together: layers of health, tools to utilize to prove it to them, the origin of the problem, and why something has happened or is happening."

"Now, if you do these four pieces all together, you're going to build such a believable case and a very comprehensive case."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #10
How to Fix It and Prevent It

Quotes from Page 5 of Your Transcript

"...once the case is fully established, you have the opportunity to explain to a patient how we can fix it and how we can prevent it."

"...make certain you're telling the complete story."

"...'the confused mind never buys.' The confused patient who lacks clarity never says yes to treatment."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #11
What Do You Want to Do, See Happen, and Go From Here?

Quotes from Page 5 of Your Transcript

"We then want to find out is the patient with us..."

"The only way to know is to ask them... 'What do you want to see happen?' 'What do you want to do about this?' 'Where would you like to go from here?'"

"...this is where you're giving the patient the ability to restate to us what they want to see happen in their mouth and what they actually want to get done."

"...it's important we do this in the operatory prior to moving to the money."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

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Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

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Team Activity

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Team Activity

Component #12
Establishment of the State of Ideal and What Optimal Is and Looks Like

Quotes from Page 5 of Your Transcript

"...it's important to reassure patients that they don't deserve to be in pain. They don't deserve to be unhealthy. They don't deserve to have missing teeth."

"It could be a patient of record forever. It could be a patient coming in for an emergency issue. It could be somebody that just in the context of their existing treatment plan... we're teaching the patient what the state of ideal is."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

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Team Activity

Component #13
Avoid Dumping Diagnosis

Quotes from Page 6 of Your Transcript

"...the biggest mistake of them all is what I call: dumping diagnosis... That's taking the patient's mouth, picking it apart, and just dumping diagnosis onto them instead of doing the dance, instead of truly building the case."

"...team members can hold doctors accountable and be their conscience..."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

For each role listed, write the name(s) of those in it and what commitment(s) they can make to improve this component of your patient experience.

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Team Activity

Component #14
Talk From the Pictures and Models and Apply It Back to the Patient

Quotes from Page 6 of Your Transcript

"You want to take their pictures, apply the state of ideal models, and relate that back to the patient… you want to create a triangle of understanding."

"'Patient, this is what we are looking at together. You can see what I can see. Patient, this is what it's supposed to look like. You see how it's supposed to fit together. Yours does not. And patient, because of these things, what we see and what I just showed you, this is now what we have to do…' This is the triangle of understanding…"

"This will lead to an obvious agreement by way of the patient because they have no other choice if we've created the triangle of understanding."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

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Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

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Team Activity

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Team Activity

Component #15
Commit to Every Transfer and Handoff Being Done Verbally and With a Triangle

Quotes from Page 6 of Your Transcript

"When you insert another team member, or doctor, or anybody into the patient engagement, the person who's been with the patient should do the first speaking of the triangle verbal discussion. Then, the person that's receiving the patient should restate or engage the patient in some manner in front of the other team members so that we close the loop."

"'The more triangles, just like I say the more pictures, the more case acceptance and the more yeses you'll have."

Guided Team Discussion

Where do you see opportunities to improve this part of your process?

Of the opportunities you identified, which team roles are directly responsible for those ideas becoming reality?

Team Activity

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Your success is made possible by your confidence in yourself, valuing what you do, and the health goals you're committed to helping your patients realize and achieve.