



Team Activity

Team Activity

Series 4 Elite Practice Evolution

Session 11 Achieving Your Next Practice Breakthroughs Working Smarter, Not Harder

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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

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1 Open Discussion: Fix the Formula

You'll begin this Team Activity by reading ahead and getting a grasp of what's in store for this step.

Review the five points listed throughout Step 1 and host an open forum with all your team members. Use the discussion questions provided as stepping stones for getting to your specific desires and commitments.

When discussing each of the five points, use the following question as your North Star when developing your team's desires and commitments:

What can we do to get to the next level in the smartest and best way possible, without adding more work and volume to our day?

1. The schedule can only be as valuable as the appointments placed in it.

Discussion questions:

- Are you placing enough valuable appointments?
- Are you protecting the primary production column?
- Are you moving beyond small units and into bigger case acceptance?

Write your desires and commitments.

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2. The anchor appointment value is the most critical part of the day.

Discussion questions:

- Do you have super anchors, middle anchors, and little anchors?
- Are your mornings effectively stacked with anchors?

Write your desires and commitments.

3. Timing and fees must be accurate and without gaps.

Discussion questions:

- Is your doctor's time being used efficiently?
- Is there seamless overlap of patient time, but no overlap in doctor time?
- Are your fees where you want them to be?
- Should your fees be increased?

Write your desires and commitments.

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4. Ensure production takes precedence, but not at the expense of diagnosing and delivering great patient experiences.

Discussion questions:

- Are there any errors you're making in the way you're scheduling?
- Is the doctor able to deliver a thorough diagnosis to every patient?
- Do team members have time to deliver your desired patient experience?
- Is your diagnostic experience producing the level of dentistry you want?

Write your desires and commitments.

5. Be future-focused and don't overfill your days.

Discussion questions:

- When you review your value-based scheduling from the past two weeks and the two weeks upcoming, is there anything you would like to change?
- Is everyone aware of your overall approach and expectations?
- What can you do to create more and make your days more valuable?

Write your desires and commitments.

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Step 2 Open Discussion: the Four Leverage Points

Just like Step 1, you'll begin Step 2 by reading ahead and getting a grasp of what's in store.

Review the four leverage points listed throughout Step 2 and host an open forum with all your team members. Use the discussion questions provided as stepping stones for getting to your specific desires and commitments.

When discussing each of the four leverage points, use the following question as your North Star when developing your team's desires and commitments:

How can we do this better?

1. **Presenting complete and comprehensive vision of the mouth, incorporating all problems and possibilities, and using photography.**

Discussion questions:

- Are you presenting complete treatment plans?
- Are you presenting complete vision of the mouth?
- Are you utilizing photography in the diagnosis, patient discussion, presentation and disclosure of the treatment?

Write your desires and commitments.

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2. Collecting as much money as possible ahead of production.

Discussion questions:

- Do you want to accelerate cash flow?
- Are collections detached from the flow of treatment and number of visits?
- Are you out-collecting production every single day?

Write your desires and commitments.

3. Removing focus on insurance from your scheduling process, materials, patient discussions and treatment presentation.

Discussion questions:

- Is there any unnecessary mention of insurance in your patient experience?
- Does your team have alignment on your verbiage and positioning when patients bring up insurance during different parts of their experience?

Write your desires and commitments.

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Step 3 Open Discussion: Expanding Potential

Steps 1 and 2 of this Activity were designed to help expand your minds and break down thought-barriers in preparation for answering the lone question in this step.

Consider the question below and brainstorm about your potential as a team, using the discussion topics provided as stepping stones for getting to your specific desires and commitments.

During this step's discussion, use the following question as your North Star when developing your team's desires and commitments:

How would you like to expand your practice's potential TODAY?

Discussion topics:

- Referrals
- Follow-up visits
- Hygiene appointments
- Maximizing billing
- Organizing your schedule columns

Write your desires and commitments.

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Step 4 Open Discussion: Build a Better Patient

Steps 1, 2 and 3 of this Activity were designed to lead up to this one final question and open discussion with your teammates.

Run through your entire patient experience and use the discussion topics provided as stepping stones for getting to your specific desires and commitments.

During this step's discussion, use the following question as your North Star when developing your team's desires and commitments:

How are you going to create the results you want and build a better patient?

Discussion topics:

- Are you getting all the information you need and conveying it to the next team member?
- Are you screening and scheduling effectively and appropriately?
- Is your welcome process fully and completely in place with: letter, video, text, follow-through, testimonials, booklet and / or package?
- Are your new patient interviews going well?
- Are you setting the tone, building the vision, and laying out expectations?
- Are you doing full diagnosis?
- Are you setting the patient up for success with the doctor?
- Are you engaging the patient, both in the present moment and the future?
- Are you executing every triangle of trust perfectly and completely?
- Are you embracing the past, present, future constructs of how we describe and communicate to our next team member?
- Are you effective and consistent in your clinical yes?
- From a presentation position, are you utilizing pictures?
- Are you keeping the full mouth integrity of the treatment presentation?
- Are you asking for all the money all the time, and, for the full acceptance on the treatment plan as it's presented?

