



# Team Activity

# Team Activity

## **Series 5** **Personal Growth and Practice Development**

### **Session 12** **Advanced Strategies on Money Flow and** **the Math That Creates the Biggest Breakthroughs** **and Gives You the Greatest Leverage**

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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](mailto:Champions@DentalSuccessToday.net)**

# Team Activity

## Step 1 Celebrating and Setting the Stage

Wrapping up yet another Practice Focus series is a special occasion, so start by celebrating!

You've been intentionally investing in your improvement more consistently and for longer than most people do in an entire lifetime. Remember where you started, when you started, and savor all the ways in which you've grown personally and as a team.

**It's time for money math, masterminding, and elevating your conversations and collections.**

**All dentistry comes from diagnosis.**

The more you focus on this, the more you'll be able to control your own destiny and the more you'll be able to help your patients in deeply meaningful, life-changing ways.

**But you must go further than diagnosis itself.**

Even if you diagnose all the dentistry in the world, you'll still plateau and be held hostage by volume and the limitations of your schedule if you don't get treatment done in BIGGER chunks.

**How the money moves makes all the difference.**

Accelerating money movement in your practice is a rising tide that lifts all things. It allows you to be better for your patients and your patients to be better for themselves.

**There are three areas of finance that get collections flowing freely and working in your favor:**

### 1. Fees

How you're paid and what people give you in exchange for what you provide.

### 2. Prepayment Structure

Connecting presenting pathways to health to bigger chunks of treatment and collections.

### 3. Energy, Feelings and Verbiage

Enhancing the ways in which you relate to practice and patient finances and truly embracing the inseparable connection between healthy collections and healthy patients.

# Team Activity

## Step 2 Fees

As a team, dive into discussion about the first of the three areas of finance: your fees.

Assess the integrity of your fees.

When was the last time you increased your fees?

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Are there any insurance dynamics you're dealing with that you'd like to change?

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Do you want your fees to be different?

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# Team Activity

## Reverse-engineer your fees.

### What are your daily goals?

Decide what your daily goals are and then calculate how much each hour of your time must be worth to reach those goals.

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### How are you currently calculating your hygiene and perio values?

Consider this before moving on to thinking about your actual case fees.

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### Are you just charging by the unit?

When calculating fees, are you simply charging by the unit (think veneers, implants, etc.) and not factoring in additional time, visits and complexities on a case-by-case basis?

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### Note

Dentures, smile makeovers, implants, ortho, sleep, TMJ therapies and follow-up adjustments should all be a PREMIUM not based on units because of the increased investment on your end. Your knowledge, time, ongoing support and expertise has an extraordinarily high level of value.

# Team Activity

**Make these points your practice mantras and recite them out loud together:**

- We don't make decisions based on fear, desperation or lack.
- We aren't powerless, we're powerful.
- Competition doesn't matter with our type of practice and our type of patients.
- Our patients want the best care.
- Our patients want the best experience.
- Our patients want what we're doing.
- Our patients don't come for the procedure or the price: they come for us.
- It's our responsibility to make sure all these affirmations are true.

**In a state of ideal, what do you want your fees to be?**

## **Tip**

Be specific and begin with raising the fees on your most common procedures first to make the most hours you possibly can be worth more to you.

## **Remember**

Everyone on the team must believe in your value if you want your patients to believe in it, too.

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# Team Activity

## Step 3 Prepayment Structure

**It's time to move on to how your fees are being collected.**

**As a team, take this chance to brainstorm how you can collect more, faster and upfront so your patients are committed to you and themselves by investing in your schedule.**

### **Note**

The more you commit to prepayment and follow the DST money breakdown communication and presentation system that was laid out in the past for you, the more you'll have huge increases in collections.

**Let's review some of the prepayment fundamentals.**

### **Back to basics:**

- You should be striving to collect all the money, all the time.
- You should be presenting the complete pathway to health and full diagnostic treatment plan every time, regardless of however many steps, stages or phases it is.

### **Magic questions and phrases:**

- *"How would you like to take care of that?"*
- *"How much can you do?"*
- *"Good news, it's only..."*
- *"It's just...to get your health back for a lifetime."*

### **Remember**

Weave benefits into your conversations because ultimately, patients buy benefits, not dentistry.

### **Example**

*"To get you fully healthy, to have a smile you're proud of, to be able to eat all the foods you love, to sleep better, have more energy, live free of pain and be done with all this, it's just X dollars."*

# Team Activity

## **To secure patient commitment:**

- Go for all the money upfront.
- If that defaults, get the money worked out.
- If that defaults, still get the schedule worked out.

## **To secure patient investment:**

- Anchor the victory to the money.
- Attach emotion to the outcome.
- Don't break down treatment, but break down the dollars.
- Lay out dollars against photographs.
- Commit to a financial plan that overlays the treatment plan so if it isn't paid for all at once and upfront, you're not discarding the full vision.
- Schedule as far out into the pathway to health as you possibly can.
- Get the money to move at least one visit ahead every time to avoid getting stuck in the "money per visit" cycle and having to start case acceptance over and over again.

## **Your prepayment structure should eliminate continually "starting over" with patients.**

No re-diagnosing, re-presenting, re-selling, re-convincing, and re-justifying the treatment plan.

## **Wherever you direct your attention, your patient's attention follows.**

Everyone on the team should be able to speak fluently with confidence and conviction about your practice's philosophy and vision of the pathway to health; all without relying on itemizations or insurance breakdowns.

## **Discuss with your team how you're presenting treatment.**

## **Questions to get the conversation started:**

- What's working?
- What isn't working?
- Are we making it easy for patients to say no to treatment or leave without paying?
- Do we have a structured system that makes it easy to always know who owes what, when?
- What can we do to have money worked out in advance of all our appointments?

# Team Activity

Begin masterminding and write down your commitments to improving your presentations, scheduling, positioning of prepayments, and collecting more upfront than ever before.

### Note

This can include decisions on bottom-line deposits, the least amount acceptable, or anything else about how insurance is impacting the flow of money that's collected in advance.

## Remember

The #1 goal of this team-wide exercise is to get more money, faster, and as close to 100% (minus any full prepayment scholarship discount) as possible. Now make it happen!

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

# Team Activity

## Step 4 Energy, Feelings and Verbiage

To conclude this team activity, you'll be doing a quick personal assessment before opening up to the team and discussing verbiage, feelings and the energy you all create around money with each other, and therefore, your patients.

**Start that personal tough-love assessment now.**

**It's time to tell on yourselves.**

Looking frankly and honestly at your language and posture toward money and health with yourself and your patients, where can your energy, feelings and verbiage fall short of communicating and expecting success and abundance all the time?

**Questions to ask yourself:**

- How am I getting in my own way?
- How am I getting in my patients' ways?
- What am I saying that's pulling patients into a mindset of lack or away from fullest health?
- What am I not saying that could inspire patients to embrace abundance and state of ideal?

**How would you like to improve your mindset, energy, feelings and verbiage this month?**

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# Team Activity

Open discussion up to the team. Everyone share what they realized during their tough-love assessment and use those revelations as inspirational topics to mastermind around together. Iron sharpens iron!

## Discussion tips:

- This all starts with the very first patient phone call.
- Never say, “cost,” always say, “investment.”
- Never say, “I know it’s a lot,” always say, “you’re worth it.”
- Beyond the first visit and treatment conference, it’s important to talk through discussions in the operatory when patients ask about money, insurance or any other procedures. You must determine whether you hit those topics head-on or redirect to the business team.
- The strength and quality of your tone, confidence and conviction will either affirm or undermine your value, practice philosophy and entire patient process.

## The bottom-line question to ask:

- In our practice, are the dollars dictating the dentistry or is the dentistry driving the dollars?

## Remember

You can’t get paid on what you don’t get accepted, and you can’t get acceptance on what you don’t diagnose.

**Detail your discussion, your decisions, imagine the possibilities, commit to new goals and engineer them into existence by making the money flow and money math work in your favor!**

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