



# Practice Focus

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## Series 5 Personal Growth and Practice Development

### Session 2 Master Your Schedule to Break Through Your Daily Goal Plateaus

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Hello team. Here we are. And in keeping with our theme and subject matter at hand, mastering time and creating more value for yourselves without extra hours or effort, we are going to dive right in and pick up where we left off last month. I've titled this, "Master Your Schedule to Break Through Your Daily Goal Plateaus." For me, I just... I really do love this stuff. How to get more out of a day, it's the most worthy challenge. And doing it without adding stress and finding ways to create more leverage and ultimately work smarter, it's fun stuff. I do hope you had fun last month working on yourselves and how you operate within the context of your daily life and the business of YOU. You do know, right? You are the CEO of "the business of you" and it's the most important position you hold in your life because it makes you better at all the other roles you play and you hold so dear.

A long time ago I made a statement to you, really a promise, that I'm going to once again make good on. That promise is that every time we reach any version of any plateau, we are going to come back to where we first began and we're going to talk about your schedule. This is because of the facts of life that time is really all we have and we can't create more of it and we don't want to take up more of it. So therefore, we have to figure out ways to level up the time we have and make the outcomes that happen inside of it worth more to you. I'm going to let you do the heavy lifting here today because your discussion will really take on a life of its own and you'll need time to work and deliberate, and most importantly, decide and then act upon your decisions so that you create real time change.

There are a few ways we can look at this and I'd like to look at it from all angles. Generally speaking, how you can just improve the way you manage and engineer your schedule now. I also want you to look at it from how you can make it better for your patient's experience, of course. And I want you to see how you can make it better for you, make it less stressed and all that... all the warm and fuzzies. You're less stressed, you'll perform better, too, with a clear mind. Now, without pressure, just without frustration, how can you make it worth more so that you can increase your daily goals and your minimum expectations rise up, of what happens as a baseline and a starting point of getting to the next higher level of dentistry in terms of the actual numbers themselves?

Now, we know goals are at the very least tied to production at this point. You should be out-collecting your production every month with your prepay and diagnostically built patient engagement. And you certainly know the way to build the more valuable schedule is to schedule more valuable dentistry and to create more anchors, to schedule fewer visits, to leave less time for anything else except creation and opportunity. Technically, if you want to grow your schedule value, the secret is to first and foremost create more time for creation. Have more time for opportunities to open up the flood gates on where dentistry is coming from and be firing on all cylinders for your five buckets; five production income streams you understand in every way, shape and form. That's advanced decisions and discussion for another Mastery Practice Focus at another time. For now, we're sticking with our conversation around mastering and making the most of the time you have in a typical day.

First, we're going to break this down into a series of questions for you to talk through as a group. And you're welcome to listen all the way through the entire presentation here I'm giving, and then come back to where we are right here. Or, you can just go one by one, one question at a time. At the end, I am going to give you a few important and advanced reminders - champions, you know, need to be reminded, it's okay - about scheduling principles that will help you to break through any plateaus you're facing right now. Okay, so here it goes.

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First question, from your perspective, what can we as a practice do to reach the next level of success in our mastery over the schedule? Controlling the schedule, patient flow, daily time dynamics within the practice, all things, all options, all variables are on the table. From your perspective, what can we do?

It's a big, broad open-ended question. Everyone gets to weigh in and I want you to do this like old-fashioned brainstorming: identify a possible challenge, sticking point or obstacle, and then make suggestions around how to fix it, improve it and make it better. No judgment on the answers right now. Then we'll go back, we'll weed out the things that don't fit, the things that you don't like, and then we'll collectively decide on the specific things you will do to try take action on an implement to help you break through.

Now, next question. In your particular position, me, myself and I looking out at the practice as a whole, when it comes to the daily schedule, where do you personally feel you could help to improve, any in particular team member or everyone is across the board, their efficiency can make the day more valuable as a whole?

So first, in general, this is from a practice perspective where we are stuck, what's holding us back. Second, is from your personal perspective of what you can do, what you feel, how you could be more resourceful to help make a difference. Okay? That's package number one, part A.

Next, I want you to move to the big, big, big question of the month. And that is given where we are now as a team, and as a practice in the level we are performing and playing at, what new rules and guidelines do we need to establish that will ensure we protect our time and we elevate our ability to hit higher goals? Of course, this is where we have to establish what are higher goals, which we'll get to in just a moment. We have to understand that it always comes back down to controlling the patient perception and expectation, the same way I'm trying to reshape and increase and elevate your own expectation and perception.

So if you just look at a daily goal now, and the hourly run rate average value, how would we increase this? How would we build upon the value of a day knowing what you now know and using every resource we have?

Every team member, every operatory, every procedure, every patient, every opportunity, you get the idea. I want you to go to town on this one and let's call it an exercise in expanding belief, removing any limits, focusing on offense, and being completely creation-minded. What would you do differently to master your schedule to increase the value of your days?

Think about the days that you had record days, record weeks, and think about what happened. What was that dynamic like? And how can we take those happenings, okay, and we can force them to happen again. We can set forth the catalytic approach to developing the schedule in a way that stimulates and facilitates those type of outcomes on a consistent day-in and day-out basis. What needs to happen to do exactly that? Are you ready? Take that, remove all why it can't work, insert all how to make it happen, and go.

When you're ready, you come back to this point and here's what I want to say. What you've most likely and probably have identified is that there have been some things come up that you used to do or you do sometimes that you now understand you need to recommit to.

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And that will be a constant theme throughout every Practice Focus because the principles are the principles. The basics, while they aren't so basic anymore, they are advanced at this point in your careers, but still they're foundational pillars that apply to your success. You can't break this.

So as a result of everything you have discussed so far, I ask you, what decisions have you made? What commitments have you agreed to? What actions are you turning into priorities? What stretch goals are you going to set? What expectations are you going to raise? What parameters are you putting in place? What plateaus, limits, are you going to break through?

Now, as if that wasn't enough, it's my turn friends. It's my turn. And so, what I'm going to do is I'm just going to hit on what I'm hopeful you have already discussed. I'm going to throw out to you 12 high-level items that are always worthy of coming back to the drawing board on and make sure you are at peak performance with. And really, everyone is on the same page and has complete understanding over them. Now, I'm going to blast through these because you've already got really what you're here for. You've already gotten through your discussion and your work on this. This will be a bonus and it will really round out the Practice Focus for this month. And it will propel us forward into the topic we're going to move towards in the future.

So here you go. 12 ways to continue mastering your schedule and make your days more valuable. Number one, and these are in no particular order. Of course, it comes back down to our anchor appointment value and what our expectations are for what an anchor is. At this point you should be having super anchors, sort of medium anchors and smaller anchors. If you even have any small anchors and then you have to double up on multi-anchors for the day. You can't just throw an anchor in the morning and then say it is what it is. You have to remember it all comes back doing that math problem of weighting the schedule to the anchor. Okay? And the value of the overall daily goals. Increasing anchor appointments, values and expectations is critical.

The next one is clearing out the clutter, and really that's for every team member. While we're talking about the actual schedule itself, every team or every team member increases the value of their time. You will increase the value of the practice time. Of course, it's no different than an equation that you don't change the number on the right without changing the number on the left. If you increased every number on the left, you'll ultimately get bigger answer on the backend. And the more numbers you increase, the more the equation or solution grows. So clear out the clutter is also about reorganizing columns, is about making sure that you're well-aligned and well-regimented in discipline in those primary secondary assistant-driven, all of the ways that it fits in. So clear out the clutter.

The next one is procedure timing and efficient treatment planning, chart notes, all of the backend communication that's necessary. So many mistakes can be made just in how treatment plans are put together, they're phased, they're bundled, the way timing and minutes are added up. That's the scalability. They only really, the biggest scalability of all of dentistry is when we have the efficiency of time within the visit. By doing more, you don't add the same number of minutes as you add more procedures or things within a visit, you all know that. So procedure timing and efficient treatment planning, as well as diminishing the time it takes to have effective and complete chart notes that lead to treatment plans, which leads to correct procedure timing.

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**The next one is assistant and room utilization.** Again, this goes back to primary secondary assistant hybrid, whatever you want to call it, making sure everyone is at the highest and best utilization of their time value, as well as every room and column there is.

**Then we have our beautiful room turnaround, tightening up sterilization, preparation, all of those little details where minutes get lost, time gets wasted.** The things like preparing every tray for the entire clinical day, things like buttoning up the day at the end before we start the day tomorrow and dozens of other things. For every team member to be at the highest and best use of time, we can't be reactively executing. We have to be proactively and therefore preparation and visualization go into this specific to the clinical schedule and the room turnaround and preparations.

**Dovetailing accurate doctor time, tightening up the units of time.** It's so silly to me when we deal in units. 10 or 15 minutes, but it doesn't take 10 or 15 minutes. Maybe it's a half a unit, maybe you need the ducktail in the middle of a unit. You have to pay attention. When the doctor is done, the next patient is ready. That has to be the theme across the board. That doesn't mean the next patient is sat, that means the next patient is ready. And it means when the doctor is done, not the patient, the procedure, the assistant, the room. So it's very important. Remember to master the dovetailing and the accurate doctor timing and tightening up the units and not being stuck in a block of time that is arbitrary and made up.

**Then we have, of course, our sacred new patient blocks.** Elevating the value of a schedule is, of course, making sure we prioritize opportunity and creation and that means never being negligent with new patient blocks.

**We have more strict screening and warming up with the patients.** All of this leads to a higher-value outcome in the schedule. Screening on the front end, warming up in the middle, and of course that's where we're at because dealing with the schedule, so not discussing on the follow-up pieces. So again, strict straining and warming up of patients, clinical team, business team, both different roles are played there. Both of those items are done by both sides of the practice at the level you are playing at now. This would be a worthy discussion all in of itself. We will talk a little bit more next month about this.

**More complete treatment and bundled treatment, equaling fewer appointments, fewer times you have to see somebody.** And I don't care whether that's virtual follow-ups, I don't care whether it's less follow-ups. I don't... whatever. But right now we're talking about more complete treatment as a whole, builds a more valuable patient, builds a more valuable schedule. Fewer appointments, more bundled and cluster treatment always upping the game and moving beyond. I shouldn't even have to say ones or twos or quadrants to you, you are always thinking in full or half mouths minimally at this point in time.

And for our specialists out there doing more singular specialty procedures, we are looking at cutting down the waste on the front, the middle and the back end of what you do, and putting you in more a point-scoring opportunities throughout the day.

**Effective delegation, end of story.** Again, this goes to everybody we will talk more about this in the coming Practice Focus months, but once again, it's everybody highest and best use of time and delegating what needs to be delegated for other people to again, rise up in their execution levels.

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**Everyone thinking ahead and being aware of next steps.** I can't overemphasize this. The minutes are lost and the inefficiencies, but more importantly the value is lost and not being effective at the most important objectives of the outcome. So what has to happen is you have to see the future. You have to be not one, two, but three steps ahead in helping set your next team member up for success, as well as setting the patient up for success. All of that helps save other people time and heavy-lifting, and dramatically increases the value of what happens within the minutes that you have.

**Finally, overall, minimizing low-value actions and mitigating time-wasting activities.** You can take that like a big warm, fuzzy, comfortable blanket, and you can throw it across everything because that one little piece is a catchall to simply ask you, where could you minimize low value? Where could you mitigate time-wasting? And how can we over the more again, on offense scoring points versus on defense dealing with the nuanced details clutter and other things. Okay?

Your final activity is to go through each of these and quickly rate yourselves as a team on how well you're doing. Do it from a scale of one to 10 like we always do, and then ask yourselves, what would make it a 10? What would make it a 10? Take one, rate yourselves and close the gap. All right?

And finalize a list of items to revisit next month that will now be ready and at the top of your minds as we charge your head. Tackle your list first, please. Tackle your list first. The work you've already done prior to my 12 methods of mastery of schedule, okay? I want you to tackle your list first in terms of implementation and then the one we built together as a high-level view of reminders for your championship team, we'll roll through those as we progress forward. All of this must be balanced with not being rushed and hurried and behind. And knowing that the more of just anything is not the point. It's not about getting more shit done. This year is not the goal. High value, not high volume, productivity. I'll say it again. High value, not high volume, productivity is the state of ideal and the only way we judge and determine the success of the day.

Now, in having this discussion and going through this month's Practice Focus, please, please, please never forget and always remember that it's not just about getting it done, going through the motions, staying on time, or even making the most of the time as the actual objective. It's helping serve the patients by moving them forward down their pathway to health through relationship, engagement, education and ultimately making certain that every time you discover something that you can do to help your patients, it is captured, accepted, scheduled, ideally paid for before they leave. And this means that your objective with time is what you can create out of it and move it on to the next team member in the cycle of time, the cycle of the patient experience and their life within your practice.

**This is where people make mistakes. It's not about time management for the sake of the time. Instead, it's about maximizing your time for the sake of the desired outcome.** And that is why to build more valuable days in the hours you've got, you must master your schedule, which is the game plan for the field you play on every single day. And like any game plan, it's only as good as the execution on the field during the game. And that's where we'll head next month using these principles, this action list, this powerful reassessment and stepping up, rising up, leveling up your mastery over your schedule. In the meantime, take care of yourself, take care of your time, take care of all of those within it. Thanks everybody.