Team Activity

Team Activity

Series 5
Personal Growth and Practice Development

Session 3
Maximizing Your Time With Patients to Create Value, Further Relationship, Trust and Education, While Driving Case Acceptance and Providing a Memorable, Engaging, World-Class Experience

Listen Online
dst.media/focus51

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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

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1
Break Down Your Categories of Appointments

Begin this activity with an open forum.

As a team, determine what your categories of appointments are at your practice.

Writer
Someone please volunteer to jot down what you come up with.

List all of your core procedures and types of patient visits.

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From your list, narrow it down to three you want to focus on right now.

Note
List the three types of patient visits you wan to see your greatest growth in, or where you think your greatest potential for improvements are.

1. _____

2. _____

3. _____

Step 2
The Macro

Pose the questions below to help uncover where you think your opportunities are.

As a team, focus discussion onto the three types of patient visits you selected in Step 1. Speak more broadly in this step to get "on the same page" as a unit before you partner up and dive into precise, specific decisions in Step 3.

When it comes to the three types of patient visits we're focusing on improving:

- Are we doing everything we can to make this the best experience possible?

- Are we missing any steps?

- Are we taking any shortcuts?

- Are we consistently completing a comprehensive diagnosis?

- Are we fully educating our patients?

- Are we thorough with our patient conversations?

- Are we nurturing relationships the way we want to?

- Are we building trust?

- Are we using Triangles of Trust effectively, completely, and with purpose?

- Are we driving outcomes with every transition between team members?

As your opportunities for improvement reveal themselves through these questions, carry them into the next step where you'll be making specific decisions at the micro level to help on the macro level.

Team Activity

Step 3
The Micro

Gather into groups of team members in similar or complimentary roles to discuss specific actions you can take that'll help your team, and your patients, get to where you want to go.

Take the three types of patient visits you've chosen to focus on and map out the minute-by-minute, step-by-step part that you and your portion of the team play in each scenario.

Tip
You really want to get down into the minutia here!

Map out each minute and your role(s) for Patient Visit Type #1:

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Map out each minute and your role(s) for Patient Visit Type #2:

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Map out each minute and your role(s) for Patient Visit Type #3:

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How would you improve the experience for each of those patient visits?

Remember

The gaps and opportunities at large that you identified as a team in Step 2. Use them as guiding inspiration for how you can adjust and make the greatest impact on your team and your patients.

On the following page, write those adjustments and commitments to improving that you'll be making.

Tip

If you want any inspiration to help narrow your focus into what the very best use of your time is, ask yourself and your small group the following questions.

For the the front office team:

- Are we asking enough questions?
- Are we getting enough information?
- Are we getting too much information?
- Are we giving the right details and right amount of details?
- What's the balance to a successful phone call?

For the clinical and treatment coordinating teams:

- Are we bringing the patient back the way that we want to?
- Are we updating health history?
- Are we looking for unscheduled treatment?
- Are we reviewing next steps on the patient's pathway to health?
- Do we need more diagnostics?
- Are we using Triangles of Trust?
- Are we making the most of our time while the doctor's in the room?
- Are there ways we could make the doctor's time more efficient?
- Are there ways we could make the doctor's time more effective?
- Do we need more or less of anything in our part of the patient experience?

Team Activity

How I / we can improve Patient Visit Type #1:

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How I / we can improve Patient Visit Type #2:

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How I / we can improve Patient Visit Type #3:

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Team Activity

If you have any questions or ideas on how other team members can improve these types of patient visits, write them and share when you come back together as a team in the next step.

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Team Activity

Step 4
Share As a Team

After everyone's finished Step 3, come back together as a team.

Writer
One team member please volunteer to write a summary of how every department will be improving each of the three types of patient visits you've focused on today.

Starting with Patient Visit Type #1, go around the room and share how each individual / group is committing to improving.

Moving from the front to the back of the office, write the flow of improvements being made for Patient Visit Type #1:

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Team Activity

Moving from the front to the back of the office, write the flow of improvements being made for Patient Visit Type #2:

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Moving from the front to the back of the office, write the flow of improvements being made for Patient Visit Type #3:

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