



# Team Activity

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## Series 5 Personal Growth and Practice Development

### Session 7 Patient Success Equals Practice Success (Part 3)

**Listen Online**  
[dst.media/focus55](http://dst.media/focus55)

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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 Discuss Your Triangles

This month's activity is all about perfecting your triangles of trust.

In this step, you'll be holding an open discussion with your team to determine your goals and intentions for each triangle.

First, designate one team member to be the scribe and document your discussion.

Then, go around the room, one-by-one, person-by-person, and get every team member's point of view on what exact expectations they have of themselves and what they should be delivering in triangles they're a part of.

### Tip

As you're going through this, consider what information you gather on the phone, what info is provided on new patients during your morning huddles, what info you get in the interview triangle, what info hygienists want to gather before the doctor comes in the room, what info hygienists want to cover with patients before the doctor comes in the room... imagine anything and everything from start to finish.

**Write your team members' personal expectations of triangles they participate in.**

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# Team Activity

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**Now, ask everyone these two questions:**

- Am I getting what I need to be successful?
- Am I giving what others need to be successful?

**Share your responses with one another, writing any key insights you gain.**

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**Now that you've considered every triangle from start to finish and what it takes from you personally to create a successful triangle, conclude by answering this question as a team:**

- What's our definition of a successful triangle?

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# Team Activity

## Step 2 Role-Play Each Triangle

It's time to role-play your triangles for every type of patient visit.

As you go through each triangle, choose a team member who's not involved in that particular triangle to play the patient.

### Examples of patient visits:

- New Patients = 3 Triangles
- Emergency Patients = 3 Triangles
- Hygiene Patients = 2 Triangles
- Specialty Patients = 2 Triangles

### Note

As you go through this exercise, don't begin right at the triangle itself! Be sure to play out the interaction that leads up to the triangle so you can practice transitioning into it.

Begin role-playing and complete the patient experience for each type of visit all the way to case acceptance, prepayment and scheduling of treatment (whether that's up front or in the consultation room).

### Remember

As you go, build in breaks to talk about what you're noticing and learning. Share amongst yourselves, documenting your discoveries and what you can improve upon and commit to.

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# Team Activity

## Step 3 Tag Team Triangles

In this step, you'll be diving deeper into the longest part of your triangles of trust.

### Examples of Tag Team Triangles:

- Doctor and Hygienist engagement.
- Assistants and Doctors during procedures.
- Assistants and Doctors at the beginning of a clinical visit.
- Assistants and Doctors at the end of a clinical visit.
- New Patient and Clinical Team building the case (whether the Doctor's present or not).
- Patient, Doctor and Treatment Coordinator in a treatment consultation presenting the case.

Similarly to Step 2, choose a team member to play the patient and role-play these scenarios together.

### Note

This is all about investing time and attention into the dynamic of team members building chemistry within the tag team approach, going back and forth, playing off of one another and guiding the patient through a harmonious, connected patient experience with full-circle communication.

### Remember

As you role-play together as a team, take breaks to discuss what you're noticing and write your discoveries, opportunities and commitments.

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# Team Activity

## Step 4 Takeaways

Now that you've completed all your role-playing scenarios, summarize your takeaways from this activity.

As a reminder, here's all that you've covered:

- Expectations of triangles
- Flow of information
- Transfers
- Transitions
- Hand-offs
- Setting team members up for success
- Tag team triangles
- Connected patient experience
- Full-circle communication

Review your takeaways, insights gained, areas of opportunity, adjustments in priorities and decisions that have resulted from role-playing together.

What will you be committing to as a team this upcoming month to improve your triangles?

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