



# Team Activity

# Team Activity

## Series 5 Personal Growth and Practice Development

### Session 9 Creating the Interactive Dental Experience

**Listen Online**  
[dst.media/focus57](http://dst.media/focus57)

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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 Review the Three Parts of Patient Engagement

**Begin by developing a shared, foundational understanding of patient engagement before moving into discussion with your team on how to refine your current clinical responsibilities and engaging patient experience.**

### **The Three Parts of Patient Engagement:**

#### **The Interactive Dental Experience**

This is how you make dentistry happen with, not to, someone and how you bring your patients along as participants instead of bystanders. You do this by asking questions, getting your patients talking and taking ownership of their health and outcomes.

#### **Using Tools and Resources**

Though the tools and resources (ie: photos, proof and pain, etc) at your disposal vary from position to position within the practice, the ultimate goal is to collectively build a complete, comprehensive case through education and be a powerful influence in healthy, smart decisions. The more engagement you cultivate between your patients and your tools, the easier it becomes to get clinical yeses and committed, prepaying, referring, healthy patients.

#### **Following a Process**

Having a clear patient process, following that process, and facilitating ongoing engagement is the way to reach and maintain your patient's state of ideal. This process starts with the very first phone call, continues inside the four walls of your practice as you see through the creation and execution of your treatment plan, goes with your patient outside your practice's physical location, and returns with them for hygiene or therapy maintenance. A defined, consistent process is every patient's pathway to health and their best chance at reaching and maintaining their state of ideal.

**When these three aspects are implemented into a cohesive, consistent experience, they create a simple correlation: the more your patients engage with you, the more ownership they take, the healthier they become, and the higher-value they become to your practice.**

# Team Activity

## Step 2 Refine Parts 1 and 2 of Patient Engagement

It's time to assess your current workflow and experience to develop a powerful "one-two punch" for your patient engagement.

Answer these questions together as a team to refine the first part of patient engagement.

What do you need to know about your patient to better help them, serve them, and give them an effective experience that will lead to a successful outcome?

### Tip

Consider every patient at every point in their pathway to health: from initial phone call, to hygiene, to new patients, to long-standing patients of record, emergency patients, patients who hold misconceptions of the role of insurance, etc.

Make sure every group in the practice contributes and responds to these questions:

- Patient intake / treatment coordinator(s): what do you need to know from patients?
- Assistants / hygienists: what do you need to know from patients?
- Doctor(s): what do you need to know from patients?

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# Team Activity

Now, flip that question around.

**What do your patients need to know about you to better help them, serve them, and give them an effective experience that will lead to a successful outcome?**

**Make sure every group in the practice contributes and responds to these questions:**

- Patient intake / treatment coordinator(s): what do patients need to know from you?
- Assistants / hygienists: what do patients need to know from you?
- Doctor(s): what do patients need to know from you?

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Compare this “state of ideal” you’ve just created with your current reality.

**What can you do to improve what patients get from you and what you get from patients?**

## Remember

Have every team member present their personal reflections, followed by collective dialogue.

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# Team Activity

Let's move on to the second part of patient engagement: tools and resources.

## Examples of tools and resources at your disposal are:

- Checklist or script for patient phone calls.
- Mailed welcome package.
- Email confirmation.
- Text message.
- Welcome video.
- Health history form.

## Tip

As you go through this portion of the team activity, consider how you're going to keep patients engaged and actively participating as you flow through your process.

## Examples of patient participation are:

- Filling out health history forms.
- Showing up on time.
- Scheduling and confirming their next appointment.
- Prepaying.
- Submitting a review.
- Referring friends and family.

## Examples of patient participation with the team / treatment coordinator are:

- Reviewing a document or poster detailing the pillars of health.
- Answering a personal questionnaire.
- Becoming educated on the role of insurance.

# Team Activity

With those preliminary examples in mind, answer these questions together and develop your approach to patient engagement.

**What's our system for engaging a patient before they walk through the door?**

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**Who in the practice owns each part of that process?**

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**What's our state of ideal when it comes to patient participation?**

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**What specific changes can we make to enhance our current patient engagement?**

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# Team Activity

As a team, role-play scenarios within your patient engagement process and practice your language and positioning during each point of opportunity you've identified.

Go into deep detail and hold space for discussion along the way as team members volunteer to role-play the aspects of the patient engagement process which they own.

To round things out, here are some basic clinical examples to consider:

- How you talk about x-rays with your patients.
- How you lead patients into questions and discovery when reviewing their photographs.
- Discussing the purpose and importance of the tools the doctor uses to diagnose.

Role-play key engagement scenarios and jot down any helpful notes as you develop consistent, powerful, shared language and process for creating engaged patients.

## Remember

Be sure every team member gets a chance to participate in role-playing!

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# Team Activity

## Step 3 Refine Part 3 of Patient Engagement by Creating Your Checklist

Finish this team activity by creating a checklist to bridge your current gaps where patients are falling through the cracks and disengaging.

Discuss and answer the following questions together.

Where are you actually losing your patients?

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When your patients don't follow through with a treatment plan or don't reappoint for hygiene, how do you follow up with them?

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When patients call in and don't schedule, what do you do?

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# Team Activity

When patients don't show up for their appointment, what do you do?

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When patients don't complete the material you give them, what do you do?

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Why do you think you lose patients along the way or don't get the engagement you want?

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Where might patients be getting overwhelmed, confused or lost in the shuffle?

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