



# Practice Focus

# Practice Focus

## Series 6 The Championship Playbook

### Session 11 Measure, Monitor and Make It Right (Part 1)

**Listen Online**  
[dst.media/focus71](https://dst.media/focus71)

- 
1. Listen to the audio recording.
  2. Follow along with this transcript.
  3. Use the transcript to help complete your Team Activity: **key points are highlighted.**
-

# Practice Focus

Welcome everyone, to one of the very final Practice Focuses of our Better Your Best, Elite Practice Series. Now today I'm very excited, because we're going to build upon the four core pillars that Maegen and I have tackled all year long. Everything from the self-diagnosis you did at the beginning, and then with each different four areas within the connected patient experience, the full circle communication, and really setting you up for success, to take your influence and your leadership to the next level to help more patients in a complete way.

Now the only thing to do when you're winning the game, and I would say in order to win the game, is you got to keep score of the game. Got to keep score. So today we're going to title our work together, "Measure, Monitor and Make It Right." You may have heard that very famous expression before. Our Practice Focus session is all about the power of tracking results, but most importantly, not the boring, tedious, time-consuming, annoying pain in ass tracking of statistics that you think of. But instead, purposefully paying attention, measuring and monitoring, so that we can use data to drive progress and to elevate performance.

This allows us to better our best where it matters most. It's also how we avoid working harder instead of working smarter. Today is all about finding the leverage by understanding reality. By tracking, by monitoring, by measuring the data points that matter most so that you can make it right, discover your truest and greatest potential, and expand your ability to create more dramatic results with less stress, less time, less effort, and by the way, even less patients. So I want to begin by saying, welcome back! You are true masters of your craft. And you are doing such incredibly meaningful work with everything you do.

You remind yourself right here, and you learn and discuss and decide. You take action, okay? And you arm yourself with the greater superpowers to make a difference on and in your patients' lives. In doing this, you get an opportunity to make a difference in your life too. So I want to say congratulations. Truly, we're so proud of you, and every month I say this, but every month we are. So I say, we're proud of you for never settling. We're proud of you for never being satisfied with the status quo or falling victim into lazy complacency. We're proud of you for being your ambitious-minded selves. So this month's Practice Focus, we're going to talk about two things, and we're going to do it right now.

The first one is a checkup on your progress and performance that can only happen by measuring and monitoring your results. This is more than just keeping track and having statistics. You must actually value them, review them, and do something from the insights you gained from them. Now, this ought to be a gentle nudge, but it could be a big giant gut punch wake up call. You simply can't get better if you don't have something to compare and contrast to what better is. And have goals that help you to break through to the next level. It is very often the underlying reason why teams aren't hitting records, is because their goals are too low, and they have gotten comfortable with where they are. They may not even know exactly where or what, certainly not why, that is.

This part of your Practice Focus is very simple. It's going to be so straightforward and really black or white. It's not arguable. So I say first, how are you currently measuring and monitoring things right now? Second, what are you measuring and monitoring daily, weekly, monthly? Third, who is doing it? Who owns the responsibility? How is everyone involved in this? And then most importantly, what are you doing with it? What are you doing with the data? While you certainly know the key indicators to success in dentistry and are paying attention to these things: diagnosis, case acceptance, prepayment and collections, production, and most of all, future-focused daily goals and scheduled treatment.

# Practice Focus

The four big categories, there are no others. However, we could dive deeper. Deeper down into new patient treatment plan values to reappointment rates, to percentage of collections from insurance versus patient payments, to conversion on specialty treatment. Or for our specialists out there, you track different referral sources. And then you track the value of patients from referral sources. You can even track the value of treatment and opportunities accepted or created in both from various team members.

There are always more layers. And the more layers you go down in depth, the more understanding, the smarter you become. And therefore the smarter the work and the leverage can become. Because this is all about bettering your best, and it's one of the final Practice Focuses in this elite series, I don't want to be a dictator here. I want to turn this over to you for an open discussion. Now we're going to begin by asking you inside of your position, every single team member, what are the key indicators of your success? How are you, and can you, better measure and monitor these things? Is it quantifiable statistics to track, or qualitative controls that need to be put in place?

Of course, the answer's always all of the above. I want you to report on this, today, right now, with your team from your perspective. At the end of the day, you're responsible for you, and for how you support your team members, and the role you play with your patient. It's so much bigger than just what you do, but the greater picture and vision of the practice overall. And really what we've worked on this entire past several months, on that connected patient experience. I want you to turn your position, your responsibility, your role into measure and monitor data and things that you can track to gauge your performance. And that way you can set goals, you can level up, you can better your best, and you can improve and grow.

After each of you has had a chance to reflect the report, I want you to set some position-by-position goals for measuring and monitoring your results going forward. And then to conclude this part of your Practice Focus, I want you to have a full-team discussion around your current results that you're measuring in how you can improve the use of this data. Perhaps it's improvements in your morning and end-of-day huddle. It might be more consistent treatment plan reviews and updating the new patient or treatment spreadsheets. And checking in, and being more proactive with follow-up. Again, it's probably all of the above. Oftentimes it's about more transparency, more flow of communication with each other.

It could also be a team member that is outperforming everyone else that could share how they're getting such great results. Remember this: we don't want to track just to be a chore, another thing to do, okay? Of course, it takes time and effort. You can do it in a smart, proactive, efficient way that will give you information to make better decisions, and to become more effective at everything you do. That's really what will make it worth it. This is how you work smarter, not harder, and you find leverage. You create leverage.

And that is where we'll move over into our second part of the Practice Focus today, all about leverage. In specific, there are four big, broad open topics that I want to pose to you. In doing so, you should be able to identify and instantly discover ways to increase your daily results by 30 to 50%. Maybe even up to a 100% in these various categories. Once again, the four big pillars that move the needle and where the vast majority of your focus should be, they're all the same as what we just discussed related to tracking: diagnosis, case acceptance, prepayment (money moving ahead, not behind), scheduled treatment, and specifically the daily goals. Again applied to the future.

# Practice Focus

At this point, you don't need my direction on what to do with these four. Instead, I want someone on your team right now to take the topic and throw it out onto the table, and initiate immediate ideas and discussion around how you can level up, double down, blow up your results with each of these and ensure you are hitting record numbers on a daily basis. This is literally bettering your best.

Your team action questions are: How can you improve and extend your diagnostic opportunities with every patient? What new technology do you have? What new education do you have? How are you incorporating photographs? How can you do a better job engaging your patients with them, and really with all pictures, proof and pain and diagnostics? What are we doing before the doctor arrives and how can we do it better? What are we doing—doctors—to build bigger visions and more complete and comprehensive long-term plans for overall optimal health?

I want you to think enhancements, not just fixing things. Possibilities, not just problem solving. And really give your patients the very, very best you've got. Okay?

Now next, the trick is to convey all of this forward and present 100% of everything you discover and diagnose. Be creators and get your patients involved in this. The next big question is what we can do to improve complete and comprehensive total pathway to health case acceptance? This is always more of the same than all of the above. Truly, I want you to go first to make better triangles. Slow down, actually get the clinical yeses. Drive more focus on outcomes, benefits, consequences, and get patients' emotional buy-in. You get the idea. A full team brainstorming session on improving case acceptance. These two things are the secret sauce: linking diagnosis to case acceptance, keeping the presentation total value.

It's very easy. Sometimes there's one or two little things, even in hygiene, or for a specialty practice on follow-up on increasing fee, or finding other elements to charge for or bundle wrap up fees into one thing. There's always places to expand and elevate to get hidden money, okay? Just to be really blunt about it. It's to find hidden money. It's going to come from building a bigger vision and more comprehensive diagnosis, and then keeping the continuity and integrity of that all the way through.

Now, next up it's very straightforward also. This is all about how are you doing on collections? And how can we do better? Tightening up, prepay, okay? The insurance piece. If you're dealing with insurance, you got to maximize it. Making sure that our collections are not at the mercy of production. Our cash flow is not at the mercy of insurance reimbursement. And this is really something important to monitor.

This is more than just accounts receivable in your 30, 60, 90 aging stuff. This is more than just timely, daily, claims filed or refiled with nothing ever getting stale or being delayed. It's really about learning to master and control the flow of treatment, but also the flow of money. Any change in strategy on how you might deal with insurance and how you hold the integrity of your prepayment protocols as a standard of excellence in your practice, I want you to discuss right now. The biggest breakthrough comes when you go all-in for all the money on all the treatment, and the full pathway to health. Just like you go for all case acceptance on the full diagnosis. Diagnosis and treatment presentation has nothing to do with how production is flowing through your schedule. Just like collections have nothing to do with how patients' appointments are flowing through your schedule either.

# Practice Focus

The secret of all secrets is to avoid letting these things get broken down with every step between every team member. That leads us to scheduling bigger chunks of treatment and fewer visits. Again, all just striving for the full and complete pathway to health to be scheduled out, and bundled up, and less appointments. This gives you your greatest leverage over your time, your people, your space, your doctor to achieve and exceed your daily goals with fewer patients faster, and therefore build more demand into the future and have more days to-goal; future-focused in the schedule ahead. And that's the ticket to the promised land, my friends. There are so many lessons to unpack here in all of this.

Discuss all four categories and make sure you finish with how you can be more effective and keep the integrity of the schedule. This is not just about scheduling better, it is about treatment flow. Everything we talked about today is about the flow of treatment and the continuity, and the wholeness of the pathway to health and total diagnosis. Making its way all the way out and through to the end, and ultimately, into your bank account and into your schedule, which leads to into your patients' mouths.

I end abruptly here today to give you more time to talk about each of these by saying, what we have now, all the way down, is compared to your current performance with your potential performance. That's what we've done. The first half and the second half is building now a compare and contrast dynamic that will allow you to challenge yourself. The magic of tracking results and having measuring and monitoring in place, because it gives you now something to build on, to compare against, and to use as motivation to better your best in every way. And to completely, completely structure the process as the saying goes, of making it right. Measure, monitor, make it right.

And I would also add it is best, it is the very best you are capable of once you know where you're at, you can define, you can clarify, you can strive for what's possible and where you're going. It's exactly like enlightening and educating a patient to see the potential, the future, the possibilities and opportunities. And then you rinse and repeat this special formula for bettering your best in every way. And you do it again and again, and again. There's work to do here, my friends. Let's get after it. And I'm challenging you today to bring this full circle.

Maegen will bring us home in our twelfth Elite Practice Success Focus, all about bettering your best with some tactical strategies and immediate communication enhancements to control and engineer your outcomes. At the end of this, you should have a clear assessment of the present results and motivational goals for the future results and very, very, very specific ways to close the gap, and challenge yourself to win, win, win in bigger and more consistent ways than ever before. And by doing that, you can now have purposeful measuring and monitoring, tracking of your statistics in order to direct and level up your progress and your performance, once again, helping you better your best on purpose, on demand, for your future.