



Team Activity

Team Activity

Series 6 The Championship Playbook

Session 2 Bettering Your Best (Part 2)

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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

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615-807-3301

Email
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Team Activity

Step 1 Review Last Month's Rankings and Commitments

Begin by picking up where you left off last month.

Grab last month's Team Activity Master Worksheet, review your rankings and commitments from Step 3, and discuss if and how you've moved the mark.

Note

This is about "progress, not perfection." Anything you've done, big or small, should result in an elevation of your ranking. Any commitment that didn't receive attention over the last month should result in a decrease of your previous ranking and compel you to swift action this month.

Value-Based Scheduling

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Team Activity

New Patient Experience

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Daily Accountability

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Team Activity

Team Meetings

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Patient Education

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Team Activity

Follow-Up

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Referrals

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Team Activity

Triangles of Trust

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Team Culture

What was your ranking last month?

Did you implement any of your commitments? If so, what were they?

Based on this month's performance, what would you say your ranking is now on a 1-10 scale?

Team Activity

Step 2 Keep Moving the Mark

Now it's time to explore how to keeping moving the mark, whether that be building upon momentum you've already established or getting yourselves unstuck from inactivity.

Review Scott's 3 Key Categories, Maegen's Food for Thought, and devote at least 10 minutes to making decisions on how to keep moving the mark in each area.

Scott's 3 Key Categories

These are the high-level concepts which must be rocking and rolling before you can engineer "10 out of 10" rankings across the board with all the smaller things in your practice.

1. **Value-based scheduling.**
2. **Daily accountability.**
3. **Your culture.**

Tip

As you make commitments for moving the mark within each category, consider this question: "What can we change that'll positively influence our scheduling, accountability and culture?"

Value-Based Scheduling

Maegen's Food for Thought

- Is your schedule being filled productively?
- Do you wish you had more anchor appointments?
- Are you finding it difficult to get anchor appointments done?
- Do you have the time and space to do big treatment when you have motivated patients?
- Do you have white space in your schedule?
- Do you need to put blocks in your schedule?
- What are you seeing at the time of scheduling?
- How are patients earning their time into your schedule?
- Are you asking for prepayments and rescheduling deposits?
- Do you need to be stricter with C patients?

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How are you going to keep moving the mark this month? Be specific: who, what, when, how.

New Patient Experience

Maegen's Food for Thought

- Are you finding it difficult to get new patients in?
- Is your schedule too crammed?
- If your schedule is currently too crammed, when does it open up so you can proactively create more of what you want?

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Team Activity

Daily Accountability

Maegen's Food for Thought

- Does every patient have a clear next step?
- Are your notes clear and well-documented with every patient accounted for?
- Are your next steps already predetermined before their next visit?
- Are you or are your patients in the driver's seat?

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Team Meetings

Maegen's Food for Thought

- Do you need to start doing end-of-day huddles or do them more consistently?
- Do you have specific goals and objectives for each meeting?
- How could your meetings be more focused and effective?
- Is there a lack of ownership?
- Is there a lack of follow-through?
- Are you holding team meetings and check-ins to discuss progress you're making on commitments y'all have made?

Team Activity

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Patient Education

Maegen's Food for Thought

- Are you building and presenting comprehensive cases?
- How are you helping influence and encourage patients to keep moving forward?

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Team Activity

Follow-Up

Maegen's Food for Thought

- Do you need to schedule follow-ups before patients leave?
- How can you ensure patients know the conversation isn't over yet?
- Do patients have a specific date and time for when the next conversation will take place?

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Referrals

Maegen's Food for Thought

- Are you asking for referrals?
- Are you positive that every patient knows all the services you offer?
- Do you have a specific referral strategy in place? "Word-of-mouth" isn't a strategy!

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Team Activity

Triangles of Trust

Maegen's Food for Thought

- How could you use more and more consistent triangles of trust?
- Can you eliminate repeating patients' excuses within your triangles?
- Can you further emphasize the reasons why the treatment plan and outcome are good?
- With larger cases, could you use a more compelling triangle of trust with the doctor to facilitate more nurturing of those patients?

How are you going to keep moving the mark this month? Be specific: who, what, when, how.

Team Culture

Maegen's Food for Thought

- How are you getting in your own way?
- Is there a lack of energy?
- Are you sharing positive patient stories and celebrating successes with your teammates?
- How are you investing in building camaraderie, momentum and positivity in your practice?

How are you going to keep moving the mark this month? Be specific: who, what, when, how.
