



Team Activity

Team Activity

Series 6 The Championship Playbook

Session 8 Setting Patients up for Success by Being a Better Leader and Guide Through Enhancing Experiences, Elevating Communication and Exerting More Control (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

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1 On the Phone

This activity carries one overarching motivation:

To develop your superpower of being your patients' conscience and keeping them moving along the pathway to health.

Individually and collectively, explore these four areas and uncover where you all can evolve beyond being an order taker and become a guide for your patients.

Area 1

On the Phone

Area 2

Clinical Space

Area 3

Triangles of Trust

Area 4

Treatment Presentation

Before you begin...

Remember:

- The kindest thing you can do to help your patients is to guide them towards getting healthy and help them justify the investment in themselves.
- Everyone wants to be smart with their money and everyone deserves to be healthy.
- The most meaningful way you can help your patients is by guiding them to feel smart about their decision, not letting them off the hook, and helping them see that moving forward is in their best interest.

Team Activity

How would you like to level up your language and positioning?

Example

“We aren’t limited by insurance contracts.”

What are other ways in which you might give in to patients’ excuses and let them control the conversation and the schedule?

Business team, jump in here as well: what are ways in which you might let patients control the conversation and the schedule?

Example

“When do you want to come in? What’s good for you?”

Team Activity

How would you like to level up your language and positioning?

Example

Create a list of the next available anchor and patient appointments so you're always prepared to say, "Our next options are [date and time] or [date and time], which would you prefer?"

Team Activity

Step 2 Clinical Space

Transition your attention into the clinical space.

Clinical team, grab the baton and lead a conversational flow similar to the previous step.

Individually, take a moment to consider the following:

Where do you become an order taker and give away control and conscience?

After taking a moment to settle into the question, choose one team member to write important notes from your team discussion during this step of the activity.

Clinical team members, kickstart your open dialogue and begin by sharing how you might fall into traps of being an order taker, lose conversational control, or if you ever ask:

Any questions, patient?

Remember

Be as transparent and honest as possible and embrace your opportunities for growth!

What are some ways in which you avoid or miss chances to choose where patient conversations go?

Team Activity

How would you like to level up your language and positioning?

Examples:

- Talk about their goal.
- Discuss where they're headed if they choose to not move forward.
- Move beyond "problems" and proactively illuminate "possibilities."
- Integrate curiosity.

Team Activity

Step 3 Triangles of Trust

Transition your attention into triangles of trust.

Everyone, hop in and collectively lead a conversational flow similar to the previous steps.

Individually, take a moment to consider the following:

Where are you being an order taker, losing control and repeating patients' excuses?

After taking a moment to settle into the question, choose one team member to write important notes from your team discussion during this step of the activity.

Anyone, kickstart your open dialogue and begin by sharing how you might fall into traps of being an order taker, lose conversational control, or if you ever repeat patients' excuses like:

- "Patient wants to check their insurance."
- "Patient only wants to do what insurance covers."
- "Patient wants to talk to their spouse first."

Remember

Be as transparent and honest as possible and embrace your opportunities for growth!

What are some ways in which you emphasize and/or empower patients' excuses?

Team Activity

How would you like to level up your language and positioning?

Examples:

- “Patient has some questions about the next steps.”
- “Doctor and patient agreed that they’re on track with their goal to get healthy and back to ‘maintenance mode.’”
- “We’re on the same page and everyone’s thrilled that patient wants to get healthy, they just have some questions about the pace of the next appointments.”

Team Activity

Step 4 Treatment Presentation

Transition your attention into treatment presentation.

Treatment coordinator(s), lead a conversational flow similar to the previous steps.

Individually, take a moment to consider the following:

Where are you being an order taker, giving away control of the conversation, and devaluing the vision of optimal health?

After taking a moment to settle into the question, choose one team member to write important notes from your team discussion during this step of the activity.

Treatment coordinator(s), kickstart your open dialogue and begin by sharing how you might fall into presenting without pictures or creating concrete follow-up.

Remember

Be as transparent and honest as possible and embrace your opportunities for growth!

What are some ways in which you deviate from protocol, don't use the full breadth of influential resources at your disposal (like patient photos), or don't secure follow-up?

Team Activity

How would you like to level up your language and positioning?

Examples:

- Begin the conversation by reaffirming your patient's goals.
- Review photos instead of a lifeless, itemized treatment plan.
- "I understand you want to [sleep on it / talk to your spouse / etc.]. How about we reconnect on a call after you have time to do that? I can answer any final questions that might come up and you can let me know your decision then. How's [date and time]?"

Team Activity

Step 5 Commitments

Wrap up this activity by making at least one trackable personal commitment.

Note

This doesn't have to be totally new and can simply be a recommitment to something you've done effectively in the past.

Give everyone a few minutes to craft their commitment(s).

My commitment(s) this month to developing my superpower (being my patients' conscience and keeping them moving along the pathway to health) is:

Allow space and time for each team member to share what they wrote.

Tip

To maximize your efforts from this activity, schedule check-ins throughout the month to see how people are doing with their commitments and celebrate victories along the way!

Practice what you preach!

Get check-ins on the calendar (i.e. secure follow-up) before you conclude this activity and step into being a guide and conscience for your teammates, helping them realize their goals over the course of the coming month (i.e. get them to optimal health in their role at the practice).