Team Activity

Team Activity

Series 7
Bettering Your Best

Session 2
Better Tracking
(Part 2)

Listen Online
dst.media/focus74

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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.

Send Us Your Master Worksheet

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1
The Four Core Areas of Tracking

Begin this activity by diving deeper into the four core areas of tracking.

Together as a team, hold an open discussion and document where you're at along the way.

The basic, underlying questions to always keep in mind throughout this activity are:

- How can we track more consistently?
- How can we track more effectively?
- What does our tracking tell us?

Someone volunteer to jot down important discussion points on your Master Worksheet and begin this roundtable on how you track throughout your patients' life cycles.

Tip
If you already have organized tracking data, pull it up and bring it into this team discussion. Use it as an aid and a way to confirm what's fact and what's feeling within the current state of your patients' behavior and your team's tracking systems.

Core Area 1
Pre-appointment

New Patient Phone Conversations:

- How many people are calling?
- How many people who called are converting into new patient appointments?
- How many people who called were quality prospects for a new patient appointment?

Remember
The idea isn't to schedule every single person who calls, it's to use scripts and systems to ensure you're doing all you can to schedule everyone who's a good match for your practice and philosophy of care.

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How are you doing with tracking your new patient phone conversations?

Referrals:

- Where are your new patients coming from?
- Are you investing enough into the people/places that produce the highest quality referrals?
- Are you following up with your referral sources on a consistent basis?

How are you doing with tracking your referrals?

Welcome Process:

- Letters, emails, texts, packages...whatever your welcome process is...is it happening?
- If a patient comes in too quickly for you to provide your full welcome experience, do you have a Plan B? And if so, are you tracking which patients received Plan A and Plan B?

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How are you doing with tracking your welcome process?

Objections:

- Do you know where you're losing patients?
- Is there a pattern as to what point in your process patients tend to fall off course?
- Do you know why you're losing patients?
- Is there a pattern as to what type of conversation leads to more patients falling off?
- Are there any ways in which you tell patients "no" or potentially confuse them?

Remember

Don't ever feel "bad" because there are objections, they're just part of the game and offer great insight: objections point to where you have the greatest opportunity to level up your verbiage, positioning and focus. Tracking objections is the first step toward exceptional growth!

How are you doing with tracking objections?

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Core Area 2
Accountability Huddles

Morning Huddles:

- What patient opportunities are you discussing and committing to?
- Are you deciding what's next to schedule? Are you deciding who's going to talk about it?
- Are you identifying what you've presented/re-presented in the past and received a "no" from the patient? Do you know why their answer was a "no" or why they dropped off?
- Are you determining what you're going to re-present today?
- Are you documenting the decisions made within your huddles?

How are you doing with tracking your morning huddles?

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Evening Huddles:

- Are you discussing what happened during the day and tracking every patient outcome?
- Are you developing a game plan going forward with each patient to keep them moving along their pathway to health?

How are you doing with tracking your evening huddles?

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Weekly Meetings:

- Are Doctor and Treatment Coordinator holding a weekly meeting?
- Are Treatment Coordinator and Clinical Lead holding meetings to review new patients? If not, do you want to start doing that, and if so, is it happening at the end of each day or the end of each week?
- Are you reviewing if you're tight on handoffs and triangles of trust?
- Is Clinical Lead feeling fully prepared and able to send every patient into the treatment presentation on a strong foot?
- Do you confirm that treatment plans are complete for the upcoming week?
- Do you have an understanding of the labs, case prep, and logistics that need to be done ahead of time?
- Are you documenting your discussion and decisions made within your weekly meetings?

How are you doing with tracking your weekly meetings?

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Core Area 3
Case Acceptance

Following Cases:

- Are you diagnosing big and going for state of ideal, optimal health, with every patient?
- If only part of what you present gets scheduled, are you always making a game plan to get the remainder of it scheduled?
- How are you following your cases? Do you have a new patient tracker?

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Remember

Don’t be discouraged if you start presenting larger cases and see more partial acceptance; that’s a sign of progress! Focus on increasing your numbers, not just your closing percentage.

How are you doing with tracking how you're following cases?

Following Up:

- Are you giving patients specific dates and times for when you’ll follow up?
- Are you encouraging and expecting patients to be accountable to you and themselves?
- When following up on your biggest cases, would it be helpful for Doctor to be involved?
- Do you have a system for how/when you follow up and do you document your discussions?

How are you doing with tracking how you’re following up?

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Core Area 4
The Three R's

Reactivation:

- Are you dedicating time to reactivation?
- Do you have a system for how/when you attempt reactivation and do you document your discussions?

Remember
Reduced reactivation can be a positive indicator with additional context: if your follow-up increases, your need for reactivation will naturally decrease.

How are you doing with tracking reactivation?

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Referrals and Reviews:

- Are you giving yourselves a target and setting yourselves up for success by handpicking a patient ahead of time to ask for a referral and/or review?
- Do you have a system for when you choose who you're asking for a referral and/or review?
- Are you first asking for feedback as your segue into asking for the referral and/or review?
- Do you have a system for documenting referrals and reviews?
- Do you have a system for when you share referrals and reviews with the rest of the team?

How are you doing with tracking referrals and reviews?

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Team Activity

Step 2
Implementation

Take what you learned from your team discussion and translate it into definitive action that'll elevate your tracking to the next level.

In this step, everyone will be making two commitments:

- One new tracking initiative to implement.
- One preexisting tracking initiative to recommit to.

Individually, identify one new tracking initiative you're going to integrate into your personal and/or team workflow.

Write every team member's new commitment on your Master Worksheet in this format:

- My name and role in the practice.
- What am I tracking?
- Who is going to be involved?
- What are we discussing?
- When is it going to happen?
- Where is it going to happen?
- How will I know if my new tracking initiative is successful?

Example:

- *Maegen, treatment coordinator.*
- *I'm taking responsibility for tracking our new patients.*
- *I'll be meeting with my clinical lead.*
- *We'll be discussing if triangles were executed well for each new patient, if we set each other up for success, and if any next steps need to be taken with those patients.*
- *This review is going to happen once a week: every Friday at 12:30.*
- *We'll block a half hour in the consult room to complete our review.*
- *I'll know my tracking initiative is a success if I meet with my clinical lead on Friday and can clearly communicate next steps with every new patient at the end of the week.*

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Write every team member's new tracking initiative:

Team Activity

Team Activity

Before deciding on a preexisting tracking initiative you'd like to reboot, check in with yourselves on how you've done with the goals you set last month in Part 1 of this extended Team Activity on Tracking.

Ask yourselves:

- Did I hit my personal goal(s)?
- Did we hit our team goal(s)?
- Have we been consistently using the new protocols we agreed to?
- Have we been consistently using our Daily Success System?
- Do I want my rebooted tracking initiative to be tied to accomplishing goals set in the last team activity or something else?

After some open dialogue, write the preexisting tracking initiative that every team member would like to reboot and recommit to in a fresh way.

Document it in the same format as the brand new tracking initiatives you just defined:

- My name and role in the practice.
- What am I tracking?
- Who is going to be involved?
- What are we discussing?
- When is it going to happen?
- Where is it going to happen?
- How will I know if my rebooted tracking initiative is successful?

Team Activity

Team Activity

Conclude this activity by deciding how you're going to track your tracking!

Build personal and team-wide accountability check-ins into your workflow to track that your tracking is getting done:

- Morning huddles
- Evening huddles
- End-of-week huddles
- Monthly meetings
- Central whiteboard
- Central calendar
- Route slips

When and how are you going to check in and report to your teammates?

Remember

You're dedicating more intentionality upfront for easier days and more consistent outcomes. The ultimate measure of success is when a small amount of effort applied to tracking actually creates more time in your days, more clarity across your team, and more "yeses" from patients.