



Team Activity

Team Activity

Series 7 Bettering Your Best

Session 5 Better Clinical Yeses (Part 1)

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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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Email
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Team Activity

Step 1 Quality Clinical Yeses

Begin this activity by discussing what a high-quality clinical yes is and how to guide your patients to clear commitments.

Complete this step of your team activity together and internalize the purpose and power of a proper clinical yes.

Remember

As you go through this activity and beyond, your personal measure for success isn't merely whether or not you get case acceptance; it's about WHAT you get acceptance on.

Together, summarize the standard of excellence you hold for yourselves and your patients.

This will serve as your personal and collective reference point going forward.

A clinical yes must:

- Adhere to the standard you've set.
- Be high in value and significance.
- Emphasize patients achieving their health goals.

Team Activity

Continue with a brief review of clinical yeses via these commonly asked questions.

What's a clinical yes?

An agreement between a patient and doctor on the outcome of treatment.

What's the essence of a high-quality clinical yes?

A conceptual and perfectly idyllic patient outcome.

Should a clinical yes be on any treatment details?

The clinical yes is only on the treatment summary.

Why's it important to keep the clinical yes at a high-level view?

An agreement that's focused purely on the outcome sets up your business team and treatment coordinator for maximum success.

How does this help the business team?

It gives them the full ability to reverse-engineer patient outcomes by building comprehensive pathways to health. This way, your team keeps complete control over the size of the:

- Yes
- Schedule
- Prepayment
- Total Investment

From here, move into discussing how you're currently creating and securing clinical yeses, and how you can improve your craft.

On a scale from 1 - 10, how would we rate the quality of our clinical yeses?

On a scale from 1 - 10, how often are we securing that quality of clinical yes?

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Going forward, how would we like to revise the definition of our clinical yes?

Would we like to increase the size and scope of our clinical yeses?

If yes, how so?

Do we have a feedback loop—going all the way back to the morning huddle—that clarifies what clinical yes we’re going to achieve with each patient and how we’re going to get there?

If not, how can we improve and make that happen?

Do we review our outcomes in our end of day huddles?

If not, how can we improve and make that happen?

Team Activity

Step 2 Gather Feedback

Gather feedback from one another to tighten up your patient experience and help set each other up for success.

Together, dive into discussion on the “3 Things” about securing clear, confident clinical yeses and pre-paving success for your patients and your team.

Thing 1

The business team shouldn't have challenges with financial conversations (aside from helping patients figure out how to sequence their investment).

Clinical team, you know you've succeeded when the business team doesn't get asked:

- “Should I or shouldn't I?”
- “Is it worth it?”

Questions like this should be addressed and overcome through your tag team triangles and clinical experience!

Open up team discussion and gather feedback from one another.

Clinical Team, gather feedback from the Business Team:

- What do patients say when they're with you?
- Where do you—we—get stuck?
- How can we do a better job giving patients clarity and confidence in their clinical yes before they exit?

Business Team, gather feedback from the Clinical Team:

- How can we support you before and after patients go through their clinical experience and engagement in the operatory?

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Write the highlights of your discussion.

Thing 2

The clinical team and doctor(s) must operate as a tag team.

Your interactions together should feel like a tennis match; volley back and forth to ask questions, collect information and keep things moving forward.

Note

This mindset applies to everyone: doctor, clinical team, hygiene, surgical, implant and ortho assistants, TMJ, sleep, anyone and everyone!

Clinical team, you might say:

- “This is really great, doctor. Patient, I want to make sure you’re clear..”

Doctor, you might say:

- “What about x?”
- “Did you discuss y?”
- “Is patient clear on z?”

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Each volley back and forth should compound your influence with your patient and ultimately culminate in a clinical yes.

Resources:

- Pictures
- Proof
- Pain
- Diagnostic Protocol
- Clinical Philosophy
- Pillars of Health

Remember

Utilize each other in combination with your resources to build value, desire and “deserve.”

Open this up to team-wide dialogue.

Where and when can your volleys be stronger?

Write the highlights of your discussion.

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Thing 3

Tracking.

The most important meeting each week is between the doctor and treatment coordinator.

Is that meeting happening every week?

If not, how can we improve and make that happen?

Every week, are we reviewing each patient that had treatment presented to them?

If not, how can we improve and make that happen?

How can we leverage our morning huddles to incorporate more “clinical yes talk?”

Examples:

- What was our objective?
 - How'd we do?
 - Were there any challenges?
 - What was the clinical yes?
 - Did that result in case acceptance, money collected and appointments scheduled?
 - If not, what could we have done better?
 - Where are our opportunities?
 - What are our next steps?
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Team Activity

Step 3 Harmony

Tie up any loose ends and make sure your team leaves this activity in complete harmony.

Together, discuss and role-play anything that needs shoring up.

Do you have complete, aligned, congruent integrity front-to-back with your pillars of health, clinical philosophy and diagnostic protocols?

Write the highlights of your discussion.

Are there any situations that could use role-playing or monitoring going forward?

If so, what's your plan between today and a month from now to make sure that happens?
