



Team Activity

Team Activity

Series 7 Bettering Your Best

Session 7 Better Clinical Yeses (Part 3)

Listen Online
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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 Future Focus Case Review

Begin this activity by looking ahead and conducting case reviews with future focus and intentionality in mind.

Decide which cases you'll be reviewing together as a team, and start your review process!

Where you can look to choose your case reviews:

- Patient Tracker
- Upcoming Patients in the Schedule
- Every New Patient for the Next Two Weeks

As you choreograph your flow, your patient experience, and your strategy to build the clinical yes at every checkpoint, come back to this image of intentionality...

Intentionality Is Specific

The more specific your game plan, the better you can challenge yourselves and grow beyond your current comfort zone.

Business Team

What can you share from the intake call to humanize patients?

Elaborate on your notes, humanize patients, and prep the clinical team:

- What's important to the patient?
- What's unimportant to the patient?
- What's a reason they left their last dental practice?
- Is there an event that motivated them to move forward?
- Is there anything bothering them?
- Is there anything the team needs to know that you can't fully capture within your notes?
- Is there another patient or game plan you've used before that would serve as a reference or starting point with this patient?

Team Activity

Clinical Team, how can you commit to fully utilizing the case-building tools at your disposal, engaging patients and co-diagnosing with them?

Hygiene Team

How can you make existing patients new again?

Ways to do that:

- Recreate the new patient experience.
- Re-present treatment chairside.
- Bring up the treatment quickly.

When bringing up treatment, don't wait until the end of the appointment, make it a priority to allow the patient their whole appointment to think about it.

Tip

Bring up treatment within the first few minutes so you have plenty of runway to work with!

Team Activity

Treatment Coordinator, where can you level up?

- If you offer it, do you calculate the “paying in full” savings ahead of time?
- Are you leading into conversations with that generous gift?
- What’s your verbiage when insurance is brought up as a roadblock?
- Are you fully confident in how you talk about money and optimal health with patients?
- Do you have a solid game plan for patients who don’t move forward or want to think about things further?

Team, feel free to help by offering the treatment coordinator your insight here.
