



Team Activity

Team Activity

Series 8 The Four Pillars

Session 11 Transforming the End of the Year Into a New Beginning by Leveraging the Four Pillars (Part 2)

Listen Online
dst.media/focus92

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 Connecting Money Flow and Schedule Control

In preparation for the turn of the year, let's wrap up our deep-dive into the Four Pillars; our leverage points for growth.

Let's find ways to level up the flow of money (prepay) and our schedule control so we can start the year with intention and investment into our health as a practice.

Healthy money flow (prepayment) is:

Getting all the money all the time (delivering dentistry that's already paid for).

Healthy schedule control is:

Designing our days around the value of appointments (because to grow our schedule, we have to grow the value of what goes into it).

When all Four Pillars (especially these two) are working in concert:

We're getting paid and then we're creating the schedule; not creating the schedule and then getting paid.

Discuss as a team and share your initial, gut-level responses:

How can we develop a stronger connection between money flow and schedule control?

- How can we finish/start the year strong?
- How can we decrease exceptions we're making?
- How can we increase our integrity from start to finish?
- How can we maximize the value of our time?

Team Activity

Step 2 Mastering Money Flow and Schedule Control

Taking care of patients—healing patients—is always our focus, and this is no different. How well we can master money flow and schedule control directly links to how well we can transform lives. Healthy practice, healthy patients.

Let's work on mastering these two pillars as an expression of our commitment to state of ideal, optimal health for everyone...yes...including ourselves!

A common mistake is to make money black and white: either somebody “has it” or doesn't. Playing in the gray area longer is the key to success!

How to play in the gray:

- Get curious
- Be on patients' side
- Help them solve for state of ideal
- Make money a tool, not an objection

Remember

When money comes up as a roadblock to next steps, that's not where the conversation ends, that's where it begins.

A common mistake is to think: “Only the business team or people up front deal with money.”

Cultural agreement on this across the practice is what earns patients' trust and reinforces our clinical integrity.

Note

What's most important isn't dealing with this transactionally, it's dealing with it psychologically across the entire team to reflect shared values and high standards.

Create space for team discussion centered around how we can improve at both the collective and individual levels when navigating the “gray area.”

Team Activity

Step 3 Questions and Answers

Let's close out this activity with some Q&A.

As a team, answer the following questions together, role-playing and crafting action plans where needed.

Are we making excuses with patients or ourselves?

Especially anything related to the time of year?

With patients, are we more focused on the “route” or the “destination?”

Can we sidestep unhelpful minutia and guide conversations in a way that always emphasizes end results and benefits for our patients?

How are we presenting/securing money?

Share and role-play to help unify our message, elevate our experience and improve our craft.

Only we know how we're presenting, so full transparency of how we're doing that is critical.

Bring the whole team into the process, compare notes, and offer feedback...don't go it alone!

Team Activity

Are we self-sabotaging by making money the main point?

Can we frame it to be a simple, matter of fact, smaller part of the bigger picture?

Are we collecting the day we diagnose, get case acceptance, and present the treatment?

How can we make sure we use this “point of least resistance” to secure healthy money flow?

Are there unhelpful habits of our own that we can unravel?

- Do we handle money and the schedule out of unconscious habit or conscious design?
- Are we dropping parts of our patient experience along the way and are unaware of it?
- Do we not know how other team members are presenting things?
- Can we unlink money and production?

Team Activity

Do patients have any unhelpful habits that we can help unravel?

- Only doing “one thing at a time.”
- Mentality about insurance.
- Lack of urgency.
- Low “deserve level.”

When we’re presenting, and the patient’s at their most pivotal point of decision-making, are we putting all options on the table?

- Are we extending the experience?
- Are we using pictures?
- Are we strategizing together with patients to pace out their comprehensive treatment?
- Are patients developing a sense of ownership and pride about their health when they’re with us?
