



Team Activity

Team Activity

Series 8 The Four Pillars

Session 7 Money Flow (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 2 Anchor Appointments

Now, let's get even more specific with our implementation strategy.

Discuss how we can optimize our money flow with Anchor Appointments.

On a scale from 1-10, rate how we're doing at asking for, and securing, prepayment with every Anchor Appointment.

How can we intentionally incorporate meaningful prepay into our Anchor Appointments to gain more control over our schedule and these patient experiences?

Team Activity

Step 3 C Patients

Let's dive even deeper into our patient-specific implementation strategy.

Discuss how we can optimize our money flow with C Patients.

On a scale from 1-10, rate how we're doing at asking for, and securing, prepayment with every C Patient.

How can we intentionally incorporate meaningful prepay into our C Patient Appointments to gain more control over our schedule and these patient experiences?

Team Activity

Step 5 Identifying Current Blocks

Identify blocks and rate these areas on a scale from 1-10 as a tool for identifying our potential and possibilities for impactful growth.

Individually, rate ourselves on a scale from 1-10 with these blocks. Then, calculate the average as a team to determine how we're doing as a whole. In addition, write down any more blocks that come to mind to along with one inspired action item to bring that area to a "level 10."

What's our collective average rating in these areas?

- _____ Guilt when asking for prepayment.
- _____ Apologizing for treatment or investment that's required.
- _____ Asking if patients "want to" (making treatment optional).
- _____ Asking if patients "want to pay now or later" (making prepayment optional).

What other areas feel like blocks to us, individually or collectively? And what's one action item for each that will capture the opportunity to move those areas to a level 10?

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Step 6 Identifying Up-Levels

Hone in on these potential up-levels to bring more parts of our patient and prepayment experience up to that level 10 performance.

As a team, on a scale of 1-10, rate where we're at—today—with these up-levels.

What's our rating in these areas?

- _____ Preparing patients about the prepay process before their appointments.
- _____ Asking patients about what they're most excited about.
- _____ Restating patients' victories or outcomes before asking for prepayment.
- _____ Getting excited about the vision and agreeing it'll be worth it.
- _____ Asking for prepayment matter of factly: "Let's get you finalized; the last step is..."
- _____ Using a positive and reassuring tone during all prepayment discussions.
- _____ Reassuring there's no extra charge, but that patients are paying less at their visit.
- _____ Reassuring this books patients' spots on the schedule; no double booking.
- _____ Going for FULL prepayment EVERY time; allowing the patient to reject before offering an alternative.
- _____ Tracking patients' prepayments and making plans for outstanding investment amounts (if applicable).
- _____ Queen of the Schedule executing key daily/weekly responsibilities to track and guide the team in creating, and following through on, "money flow action plans."

