



# Team Activity

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## Series 9 Principles of Success

### Session 2 The Power of a Single Patient

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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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**Submit Your Trifecta Contest Entry  
by the 7th Every Month**

**Monthly Momentum / Success Calendar Photo / Team Activity**

# Team Activity

## Step 1 The 3 Keys

This activity is centered around magnifying and multiplying the core components of relationship-based dentistry.

We will focus on expanding the essence of customized care through 3 key parts.

### The 3 Keys:

1. Principles
2. Implementation
3. Metrics

### Remember

We're the leaders and guides in the relationship and are responsible for, accountable to, that. We're in the driver's seat, piloting the experience, and transporting all our patients down their individual pathway to health; realizing the power of a single patient is in our hands.

**Let's get started!**

# Team Activity

## Step 2 Principles

These principles will only matter if, as a team, we're unified and unwaveringly committed to customized, comprehensive care being the heartbeat of our patient experience.

First, let's all agree to strengthen our commitment to that.

Now, let's dive into the specifics of what it means to embrace the power of a single patient.

### Keep it simple:

One patient a day who's all in on their health is all we need to blow the doors off the practice. That's it.

### Embracing the power of a single patient, with every patient, is all we need to hold in mind.

Transformation is birthed from our expectations and expressed through one patient interaction at a time. At its core, it's nothing more complicated than that.

### If we understand these, we understand everything:

- Power
- Value
- Possibilities

### What could be in our way of achieving that understanding:

- Misaligned mindset
- Insecurities
- Lack of confidence
- Not presenting patients with the option to choose for themselves

At what point do we gift patients that opportunity to choose?

The choice to leapfrog: jump straight to total, comprehensive, state of ideal, optimal health?



# Team Activity

Treating EVERY patient like a new patient EVERY time is our most direct way to capture the potential of those opportunities we just identified.

Let's put specifics to that philosophy, bring it to life in a new way, and state precisely what that means and how it manifests during EVERY part of the patient process.

Some examples include:

- The first patient of the day
- A consult
- A limited exam
- A conference exam
- A treatment conference
- A patient's first hygiene appointment of the year
- A patient's second hygiene appointment of the year
- A three or four month re-care
- A patient coming in to take care of one quadrant, but not the other
- A patient finishing one arch, but not the other

How can we treat EVERY patient like a new patient at EVERY step, based on wherever they entered our practice, our schedule, and whatever category of care they might need?

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# Team Activity

## Step 3 Implementation

Let's turn those potentialities into actualities.

Now that we've identified our "patient playbook," can we vocalize in EVERY morning huddle what "treating every patient like a new patient" looks like for each patient on the schedule?

*"Team, our 9:00am looks like this...our 10:00am looks like this...our 1:00pm looks like this...etc."*

We will commit to that up-level, yes or no?

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If so, who's responsible for leading the charge on this?

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Can we also commit to highlighting our value-multipliers at the same time, yes or no?

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Some examples of value-multipliers include:

- Perio
- Whitening
- Sleep appliance
- Expansion
- Aligners
- Referrals (and specifically what level of referral we're aiming for)

**Vertical referrals:** spouse, children, parents (think "up-down")

**Horizontal referrals:** friends, coworkers, social media circle of influence (think "adjacent")

# Team Activity

How can we upgrade our language, and consistency, when asking for vertical referrals?

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How can we upgrade our language, and consistency, when asking for horizontal referrals?

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## Value Creation Continuum

Non-clinical plus-factors that strengthen relationships throughout the patient experience.

### Some examples include:

- New patient phone call
- Triangles of trust
- Take home material and photographs
- Discovery and decision visits
- Follow-up
- Celebrating outcomes every step of the way





# Team Activity

## Step 4 Metrics

It's time to up-level our statistical tracking; we must align our outlook and goals with patients' potential, not only with what's presented.

Let's turn our metrics into value-driven data, and turn that opportunity into success stories.

Consider the 4 Pillars:

1. Diagnosis
2. Case Acceptance
3. Prepay/Money Flow
4. Schedule Control

With them in mind, let's discuss, define our insights, and make up-leveled commitments.

Can we measure the magnitude of potential with each patient at each pillar?

Can we clearly identify the gap between what is and what could be?

Can we develop a plan to close the gap in value with each patient?

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# Team Activity

Do we know where last week's patients are at? Last month's patients? Last year's?

Do we know how many people have completed their pathway to health?

Are we celebrating everyone who's completed their pathway to health?

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What are our anchor appointments?

Are they top 20%ers?

How many do we need each day, week, month, to upgrade our goals?

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