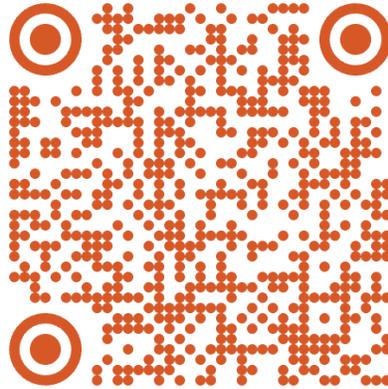




Team Activity

Team Activity



Series 9 / Session 8

Metrics That Matter

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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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Team Activity

Step 1 Past / Outcomes / Reactive vs Future / Creation / Proactive

Begin by identifying what we're currently tracking, followed by what we could be tracking.

Outline what of our tracking is "reporting what happened" (reactive) and then discuss and discover how we can leverage our tracking to improve our performance (proactive).

Think of our metrics as being divided into two categories:

- Past (outcomes, reactive)
- Future (creation, proactive)

What are we currently tracking?

Examples:

- New patients
- Presented treatment
- Clinical yeses, yeses to treatment plans
- Phone conversion to appointment, conversion to showing up

Team Activity

If we've added any newer initiatives to our practice, where are our opportunities for growth in those areas?

Examples:

- TMJ
- Aligners
- PRF
- Facial aesthetics

Winning the Day to Master the Month

Winning the Day in our Morning Huddles:

- How can we show up even more prepared to our huddles?
- Is everybody contributing, and how can we contribute more meaningfully?

Team Activity

Above the Base

This is reverse engineering our days to goal, and providers by column.

We want our days and weeks to have a baseline value, and then for us to play above that.

Master the Month

This is simply achieving and eclipsing our collections goal, and is how we keep score.

How can we play above the base?

How can we enhance our strategies in these three critical areas?

- Clinical yes
- Triangles of trust
- Treatment presentation

Team Activity

Step 3 Divide and Conquer

It's time to divide, conquer, and embrace "future banking."

With days and with our patients, future banking is knowing where we're starting, what we want more of, and where we want to take them; it's seeing the possibilities of everything that can and will be done between right now and our ideal outcome.

Divide our tracking by department, by position, by person; outline like these examples...

Phone Lead:

- Track calls, conversions to appointments, conversions to showing up.

Treatment Coordinator and Business Team:

- Treatment breakdowns by doctor, departments, value and conversion.

Clinical Team assisting Hygiene:

- Patient outcomes, average values, acceptance rate and possibilities.

Every person in the practice:

Who's committing to tracking what?

Team Activity

How can we all commit to seeing things with fresh eyes and making old patients new again?

- Update records and diagnostics
- Offer every patient a refresher on our clinical philosophy and “state of ideal” health

How will we personally commit to enriching our patients’ lives?

Team Activity

What's our plan to guarantee follow-through and leave nothing left to chance?

When we will schedule our weekly meeting that reviews patients, treatment, and next steps?

How will we level up our approach to proactivity, remove all ambiguity from our patient experience, and always point our focus to possibilities first, then outcomes and collections?

This is about leveraging intentionality and developing a deliberate, disciplined approach so our success won't be packed with stress: we commit to consistency, predictability, and ease!