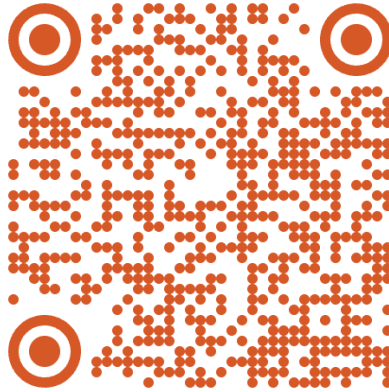




# Team Activity

# Team Activity



## Series 9 / Session 6

### **Mission, Not Motion: Breaking Through Limited Beliefs with Insurance, Production, Money and Schedule**

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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 Creating Opportunities and Controlling Outcomes

The health of our patients and our practice hinges upon our depth of action-taking within the 4 Pillars.

Let's discuss, discover and decide how we're going to deepen the integration of the 4 Pillars into our patient experience to create opportunities, control outcomes and better our best.

### The 4 Pillars:

1. Diagnosis
2. Case Acceptance
3. Prepayment
4. Schedule Control

**If we're not focused on the MISSION, we'll default to the MOTIONS.**

Here are some spots we can use as anchor points to the mission throughout our days...

### Creating Opportunities:

- Morning Huddle
- Our Diagnostic Approach
- Patient Conversations of All Kinds

**What are some other spots we think we have an opportunity to create more opportunity and anchor to our mission?**

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# Team Activity

## Controlling Outcomes:

- End of Day Huddle
- Triangles of Trust
- Accountability Toward No Patient Being Left Behind
- Presenting All the Treatment (Big Picture, Pathway to Health)
- Asking for All the Money (Securing Large Pieces and Not Breaking Down Into Visits)

**What are some other ways we think we have an opportunity to control more outcomes and anchor to our mission?**

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**Do we need to fine-tune any of these anchor points within creating opportunities and controlling outcomes?**

List specific, actionable steps we'll be taking to increase our consistency and connectedness within these areas.

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# Team Activity

## Step 2 Thinking Bigger, Being Bolder and Deserving More

We first need to grow our own deserve level before our patients can reciprocate.

Let's do the work to expand everyone's deserve level and all the ways in which we're giving and receiving.

### Deserving More means:

1. Knowing that we're doing is worthy.
2. Raising our expectations of ourselves, our teammates, and our patients.

### Thinking Bigger means:

- Diagnosis
- Vision
- Investment Structure
- Fees
- Bundling

### Being Bolder means:

- Confidence
- Powerful Questions
- State of Ideal, Optimal Health
- No Negotiating or Tolerating Less than We or Our Patients Deserve
- Championing Moving Patients Forward

### Our Mindset to Tie This All Together:

1. We're far beyond triaging problems; we're not just fixing things.
2. We're proactive, we're creators, and we're in the business of possibilities; investing in long-term health and quality of life enhancement.



# Team Activity

## Step 3 Insurance and Higher Quality Conversations

Patients come to us looking for personal leaders and guides: it's our job to educate and demonstrate what insurance actually can do for them, and how to think about it in relation to optimal, state of ideal health.

Let's level up the way we talk about insurance and embolden our patients to take ownership of their care like never before.

Whether we're on contracts with insurance companies or not, our mindset should be:

- We're off contracts
- We're non-assignment
- We're full concierge

How might we be lowering the bar?

Examples:

- Using the word "cost"
- Suggesting to patients that treatment "is a lot of money"
- Improperly positioning insurance or focusing too much on it

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# Team Activity

**What can we do and say to raise the bar?**

**Examples:**

- Using the words “gift card,” “supplement,” and “contribution”
- Educating patients that insurance is a small part of the big picture
- Assuring patients that their benefits will be maximized
- That insurance is best served as a bonus for patients “healthy maintenance mode”
- Reminding patients that there are many pathways to the money and that insurance is only one of them
- Sidestepping being stuck in “prices,” “pieces,” “procedures” or “visits,” and instead, being grounded in “vision”

**Tip**

To level up our conversations, always consider how we can move from discussing “what” we’re doing and shifting it to “why” it matters.

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# Team Activity

**How can we layer these 3 movements into our patient conversations to build momentum?**

1. Past → Problems
2. Present → Preventions
3. Future → Possibilities

Some examples of where we can leverage these movements are in:

- Discovery Visits
- Financial Facilitation Visits

List some specific, up-leveled language about Problems, Preventions and Possibilities that we'd all like to adopt:

[illegible]

# Team Activity

## Step 4 Prepay and Champion-Level Tracking for Ultimate Schedule Control

**Prepay and understanding our data is the foundation for schedule control.**

**Let's leverage our data and track like Champions so we can control our days.**

**Can we commit to tracking the percentages of prepay, financing and insurance on the total plan presented?**

Yes or no, and if yes, who will be responsible for this?

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**Can we commit to collecting our accounts receivable at the time of service?**

Yes or no, and if yes, who will be responsible for this?

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**Can we commit to presenting the total plan every time, and tracking what our acceptance rate is above our chosen baseline dollar amount (ex: \$5,000) and how fast patients are moving forward?**

Yes or no, and if yes, who will be responsible for this?

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### **Remember**

We **MUST** present the total treatment plan every time, because if we don't, it'll skew our data and make it less effective for us when Mastering the Month.

**Can we commit to "Mastering the Month Ahead?"**

Yes or no, and if yes, who will be responsible for this?

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# Team Activity

**Mastering the Month is knowing:**

- Daily Goals
- Weekly Benchmarks
- Base to Goal
- New Patient Data
- 30-Day Run Rate

**How can we commit to translating this knowledge into meaningful action; into working smarter, not harder, on a consistent basis?**

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**Motivation to Carry With Us:**

- *"You cannot have a positive life and a negative mind."*
- *"Go for it now. The future is promised to no one."*

**In summary, how will we "go for it now" with our patients and with ourselves?**

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