Team Activity

**Series 9
Principles of Success**

**Session 5
Creating Opportunity
and Maximizing Health Impact**

Watch Online
dentalsuccesstodayonline.com/9-5

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.

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

Monthly Momentum / Success Calendar Photo / Team Activity

Step 1
Master the Month

The prosperity of our practice is directly connected, correlated, and a perfectly mirrored reflection of our impact on patients.

Let's learn how to advance our reverse engineering efforts and create more opportunities for health impact with our patients.

Mastering the Month is:

1. Looking ahead and merging our tracking and creation skills
2. Seeing production, what's collected, uncollected, and our new patient opportunities
3. Mapping our unscheduled treatment opportunity over the next 30 days

Our end result is to have identified:

1. Days to goal
2. What we can do to improve those days
3. All the treatment opportunity and health impact opportunity we have

Visualize to Realize is:

1. Future casting our next week
2. Playing above the base
3. Creating more diagnostic opportunity than we need to achieve our daily goals

Put those steps into action now:

1. **Team, Master the Month:**
   Look 30 days out and calculate creation

2. **Doctor, treatment coordinator, clinical lead and / or business liaison, Visualize to Realize:**
   Look at the last 7 days and the next 7 days

3. **Team, position groups, individuals, Maximize Impact:**
   Prepare, make decisions, and take action to preemptively cultivate case acceptance and positive, powerful patient outcomes.

Master the Month

Team

30 days ahead

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Team Activity

Visualize to Realize

Doctor, Treatment Coordinator, Clinical Lead and / or Business Liaison

Last 7 days and next 7 days

Maximize Impact

Team, Position Groups, Individuals

Prepare for powerful patient outcomes

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Step 2
Creating Contributions for Impact

In its simplest form, there are are two foundational pieces to creating impact:

1. Knowing our patients
2. Knowing ourselves

Leverage those knowings by highlighting specific position groups, team members and tasks, deciding how we all are going to contribute to the collective creation of opportunity.

Let's begin that journey by walking through a day from start to finish.

Look at our schedule and choose a day to role-play: one that's brimming with potential.
Let's pick a day in our near future: sometime between tomorrow and the end of next week.

Start with the morning huddle and begin discussing and role-playing as a team.

What do we need to know, and what's helpful to know, about every one of today's patients, and what experience are we creating for each of them?

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Team Activity

Now pause, and let's reverse engineer how we got here by starting with specifics and ending with the big picture:

- Who's relaying this information to the team in the morning huddle?
- Who's responsible for collecting that information ahead of time, before the huddle?
- Where did that person get the information from, and who were they relying on for it?

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What systems and commitments are we leaning into to ensure we're able to do this efficiently and effectively on a daily basis?

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Team Activity

What are everyone's core responsibilities that make it all work in concert?

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Team Activity

Unpause, and let's keep moving forward with role-playing the day.

After we've collaborated in the morning huddle to "know our patients," can we close our huddle by "knowing ourselves" and create the template for a connected patient experience?

- How can each of us express our core responsibilities throughout the day?
- Where are our inflection points, our opportunity for health impact, where knowing our patients and knowing ourselves overlaps and comes to life?
- How can our triangles of trust communicate our core responsibilities with team members and emphasize our inflection points for maximum health impact for our patients?
- How will we make an impact on impact?

Tips

When expressing our core responsibilities, let's consider the tangible and consistent, as well as the flexible and intuitive opportunities we can have during the day. And when thinking about our triangles of trust, let's focus on investing in a connected patient experience that creates a continuum for value creation, clinical yeses, smart decisions and deserve level.

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Team Activity

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Step 3
Stretch Goals

Let's close out this activity by examining our goals for ourselves and our patients.

Reverse engineer this process by redefining our optimal health philosophy for our practice.

What is the quality of life we expect for our patients and ourselves as a practice?

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Team Activity

How are we delivering that message throughout the 4 Pillars?

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

Moving patients from:

- Problems to possibilities
- Dentistry to defining success
- Cost to value
- Uneducated to smart decisions

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Team Activity

How can we define what a "level 10" is to educate our patents (i.e. visualize) **and then utilize our "scale from 1 to 10" tool to achieve our standard of excellence** (i.e. realize)**?**

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Are there any other areas of opportunity we'd like to highlight and work together on right now?

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Team Activity

Considering our updated clinical philosophy, delivery of our message, areas of opportunity, and expectations for our patients and ourselves, what are my stretch goals for the next week, month and quarter?

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Considering our updated clinical philosophy, delivery of our message, areas of opportunity, and expectations for our patients and ourselves, what are our team's stretch goals for the next week, month and quarter?

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Team Activity

What can we commit to and systemize to help us maintain perspective and pace for achieving our stretch goals?

Examples:

- Treating every patient like a new patient every time
- Making old treatment new again
- Morning and end of day huddles
- Tracking
- Team reviews
- Follow-up

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