

Quarterly Referral Package Instructions

Inside is your 4th Quarter Referral Package!

This quarter, we are combining the Monthly and Quarterly package so that you receive all the same material in one package rather than two separate packages. Your implementation/integration will be the same. Read on for our instructions 😊

Please review the following paragraphs for information about how to integrate this material into your team meetings.

- **Patient Engagement Theme:** This theme will span the entire month. Please make the team aware of the theme early in the month and use the included display materials (counter card) to notify patients of the month's theme.
 - National Days Calendar: Use this to find more ways to engage your patients on a daily and weekly basis.
 - Digital Files: We have provided an editable counter card (if you'd like to run a contest) and social media images that you can use. These items are located in our online portal. Contact Tyrella for access if you do not know your login.
- **Team Leadership:** Kevin has provided a monthly Team Leadership and Development topic for the team champion to utilize in coaching the team as well as weekly activities to promote growth in this area.
- **Quarterly Practice Focus Team Training:** Scott has provided an advanced team training for the quarter- this will replace the monthly Practice Focus for October.

Below is a sample schedule of implementation of these materials. Depending on your practice's meeting schedule, you may modify this to fit your needs.

Note: The Quarterly Team Training is longer than the Monthly Practice Focus- depending on the amount of time you have available for your meeting, you may need to schedule a longer meeting once per quarter or split into multiple meetings.

| Topic/Facilitator | Preparation/Purpose |
|--|--|
| Opening statements-celebrate victories, report successes (5 Minutes) | |
| Watch the Team Sports Dentistry Webinar and Complete the supporting team activity (90+ Minutes) | Make copies of the Workbook and activity handout for each team member. <i>Optional:</i> Have team watch the webinar prior to the meeting |
| Read Kevin’s Team Leadership Message and complete the accompanying Team Leadership Activity (15-20 Minutes) | Make copies of the Message and activity handout for the team. You may choose to omit the weekly activities since you do not have weekly meetings. |
| Review the Patient Engagement Theme for the following month and discuss implementation (10 Minutes) | Be sure to edit the counter card you choose to use (either pet, kid or both) and utilize the digital files in the online portal. www.dentalsuccesstodayonline.com |
| Review overall Collection Goals and Progress/Production Goals/Case Acceptance/ (15 Minutes) | |
| Everyone to review New Patient flow and success of Treatment and necessary follow-up- team to discuss any gaps in the NP process that may need to be improved (10-15 Minutes) | New Patient Coordinator should come prepared with NP numbers for the month- could also use 5 Buckets tracking sheet here and each team member who “owns” each bucket presents the numbers for the month for each bucket |
| Everyone to address any Team related concerns or issues to be brought forth to Team Leader/Doctor (5-10 Minutes) | |
| Adjourn | |

Contact Tyrella for the editable/digital version of this agenda template

Practice in Action and Practice Profit Accelerator Call

- Listen to the **Practice Profit Accelerator Call** to hear Scott and Kevin's responses to some of our most asked questions regarding practice growth.
- Check out our **"Practice in Action"** to see the winner of our monthly drawing!
- Be sure to hold on to the **"Share Your Success"** document for instructions to enter in the drawing each month. We want to celebrate your successes with you and see the positive changes you are making!

For any questions about this package, please contact Tyrella at Tyrella@dentalsuccesstoday.net.