

Practice Focus

October 2026

Your Practice Does What It Is Built to Do: The Power of Mastering the Month and 7x7

1. *Mastering the Month*

- The Seven Steps to Master Every Month
 - Collections
 - Production
 - Opportunity
 - Decision Visits
 - Financial Facilitation / Follow Up and Follow Through
 - Unscheduled Tx and Continuation of Care
 - Hygiene
- Playing Above the Base
 - Calculate Projected Averages of Each Category

2. *7x7*

- Patient Impact Meeting
 - The Last 7 Days
 - 30, 60, 90 Review
 - The Next 7 Days

Action Plan

Mastering the Month



The Seven Steps to Master Every Month

*Review these seven steps as a team.
Discuss and make adjustments and commitments as needed.
This is reverse engineering in action!*

Collections:

*This is last month's money in the bank.
Is this being tracked and reported?*

Production:

*This is what's owed to us this upcoming month.
Is this being tracked and reported?*

Action Plan

Mastering the Month



The Seven Steps to Master Every Month

Opportunity:

*This is the number of new patients in the schedule.
It's also moving patients in and moving patients up FASTER.
Is there proactive optimization of the schedule for the next 30?*

Decision Visits:

This is knowing the answer to the following questions...

When are they?

What is the Tx value?

Who are they?

*What can I do to create a greater probability of case acceptance;
are we following our own success system with these patients?*

Action Plan

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The Seven Steps to Master Every Month

Financial Facilitation / Follow Up and Follow Through:

*This is understanding the money 30 / 60 / 90 days out.
Are we closing and getting prepay for visits within each interval?*

Unscheduled Tx / Continuation of Care:

*This is knowing what Tx is done and what needs to be done.
In the next 30, who has done X but still needs Y?
Our team should be hearing this BEFORE a Morning Huddle;
that should be our place to review our plan, not develop it.*

Action Plan

Mastering the Month



The Seven Steps to Master Every Month

Hygiene:

*This is building the bank and knowing exactly what opportunity is emerging specifically from this arm of the practice.
Are we identifying and reporting creation from the hygiene team?*

When these seven steps are complete,
now we can play above the base.

Calculate Projected Averages of Each Category:

*Assign patient names to each value and create accountability.
Are we in a place where our monthly projection is above our base goal, and how are we accountable to those projected outcomes?*

Action Plan

7x7

Patient Impact Meeting: The Last Seven Days

Who:

*This meeting includes (at minimum) Doctor and TC.
Who is committed to joining this meeting?*

What:

*Discussion about every single patient we presented
X amount of treatment to.
What is our \$ threshold of treatment we discuss?*

Ask:

*Where are they in the stream of treatment?
How much did they say yes to?
What's our next step?
What is our strategy on money?
When is their next appointment?*

30, 60, 90:

*After the last 7 days, review every patient from our 30, 60, 90.
Even after completing treatment, we revisit to ensure follow-through on everyone until we reach our finish line...
getting a testimonial and asking for referrals.*

Action Plan

7x7

Patient Impact Meeting: The Next Seven Days

Review:

What labs do we need done?

Who owes us money?

Are those appointments double-confirmed?

What new patient visits do we have?

What decision visits do we have?

What financial visits do we have?

For Our Financial Visits:

Are the treatment plans ready for those visits?

Do we need to rehearse to be more prepared?

Do we need to make sure the spouse will be there?

Do we need to confirm financing information?

How will we ensure our 7x7 meeting happens weekly?

How will we ensure we review all these questions?

How will we ensure all this info is prepped before the meeting?
