Team Activity

Step 1
The 3 Keys

This activity is centered around magnifying and multiplying the core components of relationship-based dentistry.

We will focus on expanding the essence of customized care through 3 key parts.

The 3 Keys:

1. Principles
2. Implementation
3. Metrics

Remember

We're the leaders and guides in the relationship and are responsible for, accountable to, that. We're in the driver's seat, piloting the experience, and transporting all our patients down their individual pathway to health; realizing the power of a single patient is in our hands.

Let's get started!

Step 2
Principles

These principles will only matter if, as a team, we're unified and unwaveringly committed to customized, comprehensive care being the heartbeat of our patient experience.

First, let's all agree to strengthen our commitment to that.

Now, let's dive into the specifics of what it means to embrace the power of a single patient.

Keep it simple:
One patient a day who's all in on their health is all we need to blow the doors off the practice. That's it.

Embracing the power of a single patient, with every patient, is all we need to hold in mind.
Transformation is birthed from our expectations and expressed through one patient interaction at a time. At its core, it's nothing more complicated than that.

If we understand these, we understand everything:

- Power
- Value
- Possibilities

What could be in our way of achieving that understanding:

- Misaligned mindset
- Insecurities
- Lack of confidence
- Not presenting patients with the option to choose for themselves

At what point do we gift patients that opportunity to choose?

The choice to leapfrog: jump straight to total, comprehensive, state of ideal, optimal health?

Team Activity

Where do we think we're getting in our own way? Of not allowing patients the chance to fast track their pathway to health?

Answer individually, on behalf of yourself and the team, and then open up the floor to share responses and identify opportunities.

Remember

The only thing limiting our patients' value is our own definition of what value is; the power of a single patient is in our hands, not their mouths.

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Team Activity

Treating EVERY patient like a new patient EVERY time is our most direct way to capture the potential of those opportunities we just identified.

Let's put specifics to that philosophy, bring it to life in a new way, and state precisely what that means and how it manifests during EVERY part of the patient process.

Some examples include:

- The first patient of the day
- A consult
- A limited exam
- A conference exam
- A treatment conference
- A patient's first hygiene appointment of the year
- A patient's second hygiene appointment of the year
- A three or four month re-care
- A patient coming in to take care of one quadrant, but not the other
- A patient finishing one arch, but not the other

How can we treat EVERY patient like a new patient at EVERY step, based on wherever they entered our practice, our schedule, and whatever category of care they might need?

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Team Activity

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Step 3
Implementation

Let's turn those potentialities into actualities.

Now that we've identified our "patient playbook," can we vocalize in EVERY morning huddle what "treating every patient like a new patient" looks like for each patient on the schedule?

"Team, our 9:00am looks like this…our 10:00am looks like this…our 1:00pm looks like this…etc."

We will commit to that up-level, yes or no?

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If so, who's responsible for leading the charge on this?

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Can we also commit to highlighting our value-multipliers at the same time, yes or no?

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Some examples of value-multipliers include:

- Perio
- Whitening
- Sleep appliance
- Expansion
- Aligners
- Referrals (and specifically what level of referral we're aiming for)

Vertical referrals: spouse, children, parents (think "up-down")

Horizontal referrals: friends, coworkers, social media circle of influence (think "adjacent")

How can we upgrade our language, and consistency, when asking for vertical referrals?

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How can we upgrade our language, and consistency, when asking for horizontal referrals?

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Value Creation Continuum

Non-clinical plus-factors that strengthen relationships throughout the patient experience.

Some examples include:

- New patient phone call
- Triangles of trust
- Take home material and photographs
- Discovery and decision visits
- Follow-up
- Celebrating outcomes every step of the way

Team Activity

Remember

It's our responsibility to screen for A, B and C patients on the front end, and it's also our responsibility to develop A patients throughout their journeys; to educate and demonstrate how to think about health and behave like a top 20% patient.

Some example questions for self-reflection include:

- What am I doing to engage with patients to expand and strengthen the relationship?
- How am I adding value for them?

Where can we contribute more value to our patients to help make them more valuable to us?

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After we:

- Give every patient the benefit of the doubt…
- Guide them through our value creation process, where every team member is adding more and more value, and receiving a better and better patient along the way…
- And fully demonstrate what comprehensive care and complete health dentistry looks like…

How can we open up more and more room for patients to run and cement themselves as a "top 20%er?"

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Our short-term ideal:
Dedicate the most time to the patients who care the most about their health.

Our long-term ideal:
Take our "top 20%ers" as a perfect patient model and turn 50% of our practice into that model.

Step 3
Metrics

It's time to up-level our statistical tracking; we must align our outlook and goals with patients' potential, not only with what's presented.

Let's turn our metrics into value-driven data, and turn that opportunity into success stories.

Consider the 4 Pillars:

1. Diagnosis
2. Case Acceptance
3. Prepay/Money Flow
4. Schedule Control

With them in mind, let's discuss, define our insights, and make up-leveled commitments.

Can we measure the magnitude of potential with each patient at each pillar?

Can we clearly identify the gap between what is and what could be?

Can we develop a plan to close the gap in value with each patient?

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Can we develop a snapshot of patient compliance?

Are they engaged from phone call, to appointment, to arriving on time, to having their comprehensive exam and a full treatment presentation, and ultimately, completing their pathway to health?

Are they following through, and are we following through?

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Team Activity

Do we know where last week's patients are at? Last month's patients? Last year's?

Do we know how many people have completed their pathway to health?

Are we celebrating everyone who's completed their pathway to health?

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What are our anchor appointments?

Are they top 20%ers?

How many do we need each day, week, month, to upgrade our goals?

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Team Activity

How can we inspect what we expect?

How can we become more accountable and committed to what we're tracking?

Can we prioritize weekly reviews?

Can we center those reviews not just on how much treatment the business team closed, but on how much value the clinical team built?

Can we highlight bigger trends like new patient value, average visit value, and overall patient lifetime value?

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Can we monitor our success of visualizing our days?

In our morning huddles, can we identify what it means to treat every patient like a new patient, call out every patient's next step on their pathway to health, and be in full alignment on what it means to move everyone forward that day?

In our end of day huddles, can we be more accountable to leaving no patient behind, tying up all loose ends, and truly closing out our days so we can start the next one fresh?

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All of our decisions and commitments are accomplished through our masterful mindset:

We're laser-focused on patient potential, not merely practice production.

We educate, elevate, and empower our patients to make smarter, better, bolder decisions.

And our core value of creating a community full of more and more "top 20%ers" is what's exciting, invigorating and motivating for us—and most importantly—why our patients love us.