



FRONT DESK HEROES

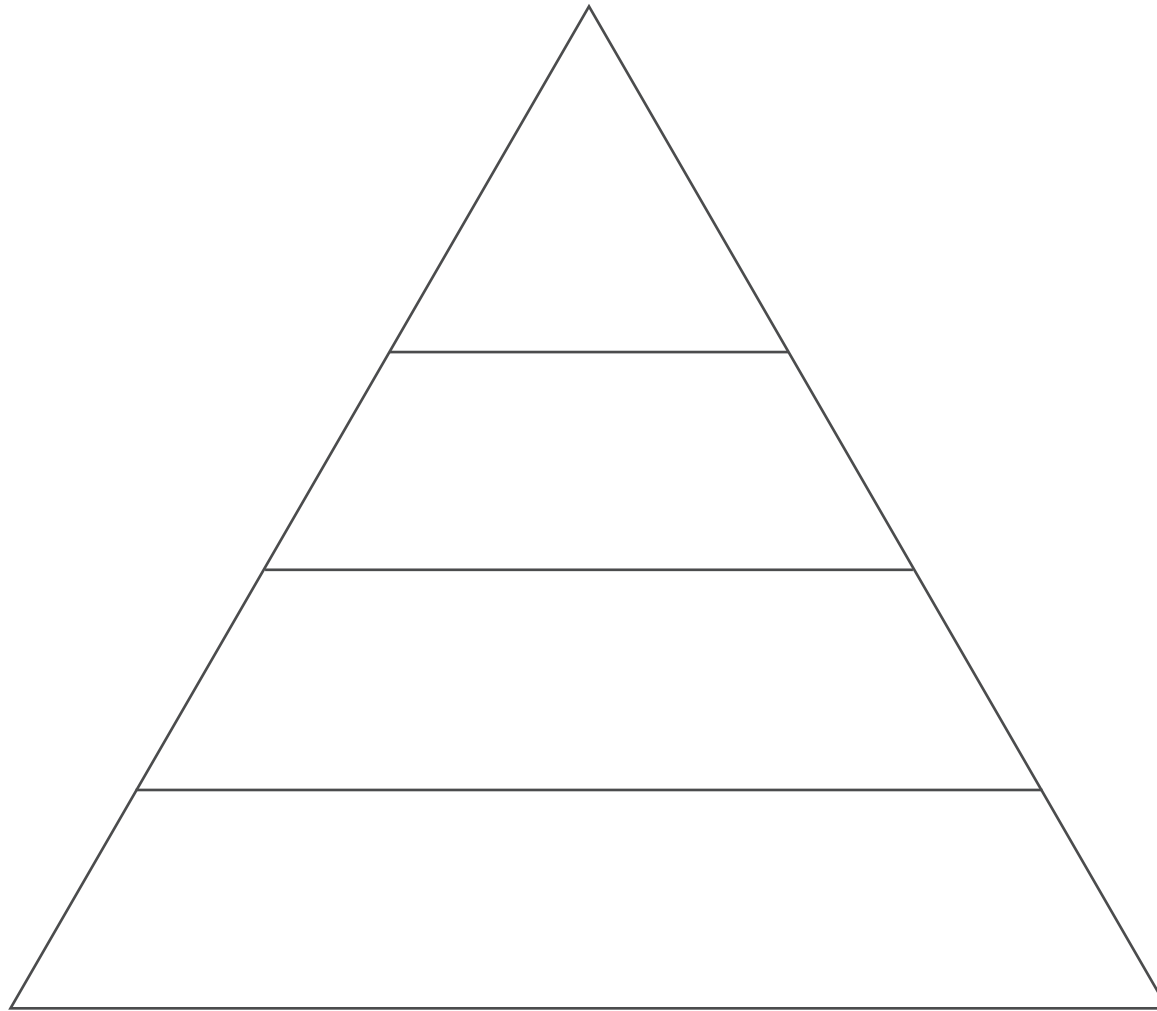
CONTENT

| | | | |
|---------------------------------------|-----------|---|-----------|
| Insights and Actions | 5 | Boundaries & Standards | 44 |
| Front Desk Heroes | 6 | I-Messages | 45 |
| The Performance Culture Matrix | 7 | | |
| Rockstar Your Reception | 8 | | |
| NEXT LEVEL COMMUNICATION | 11 | HANDOVER WITH CARE | 49 |
| Framework Components | 12 | A Compelling Reason to Return | 50 |
| Simple Frameworks | 13 | Patient Handover | 54 |
| Patient Appointment Booking Framework | 15 | Talking Money | 57 |
| Dealing with Cancellations | 19 | MEET WITH PURPOSE | 61 |
| Dealing with Complaints | 22 | Meeting Rhythm | 62 |
| Complaint Handling System | 23 | The Morning Huddle – Agenda & Flow | 63 |
| Dealing with Complaints | 24 | Huddle Preparation Form – Front Desk / Practice Manager | 64 |
| Price Shopper Framework | 28 | Weekly Team Meeting | 66 |
| Preferred Provider Framework | 30 | The Results Dashboard | 67 |
| Hygiene Only Framework | 32 | The Weekly Team – Project Prep Sheet | 68 |
| Asking for a Referral or Review | 36 | STRUCTURE APPOINTMENT BOOK | 73 |
| POLISH YOUR PRESENTATION | 41 | Pre-block your Appointment Book | 74 |
| The Perfect Presentation Audit | 42 | Production Pre-Blocks | 75 |
| Professional Language | 43 | Administrative Time Duties | 76 |
| | | The Recall System | 77 |
| | | The 5 Star Reminder System | 78 |

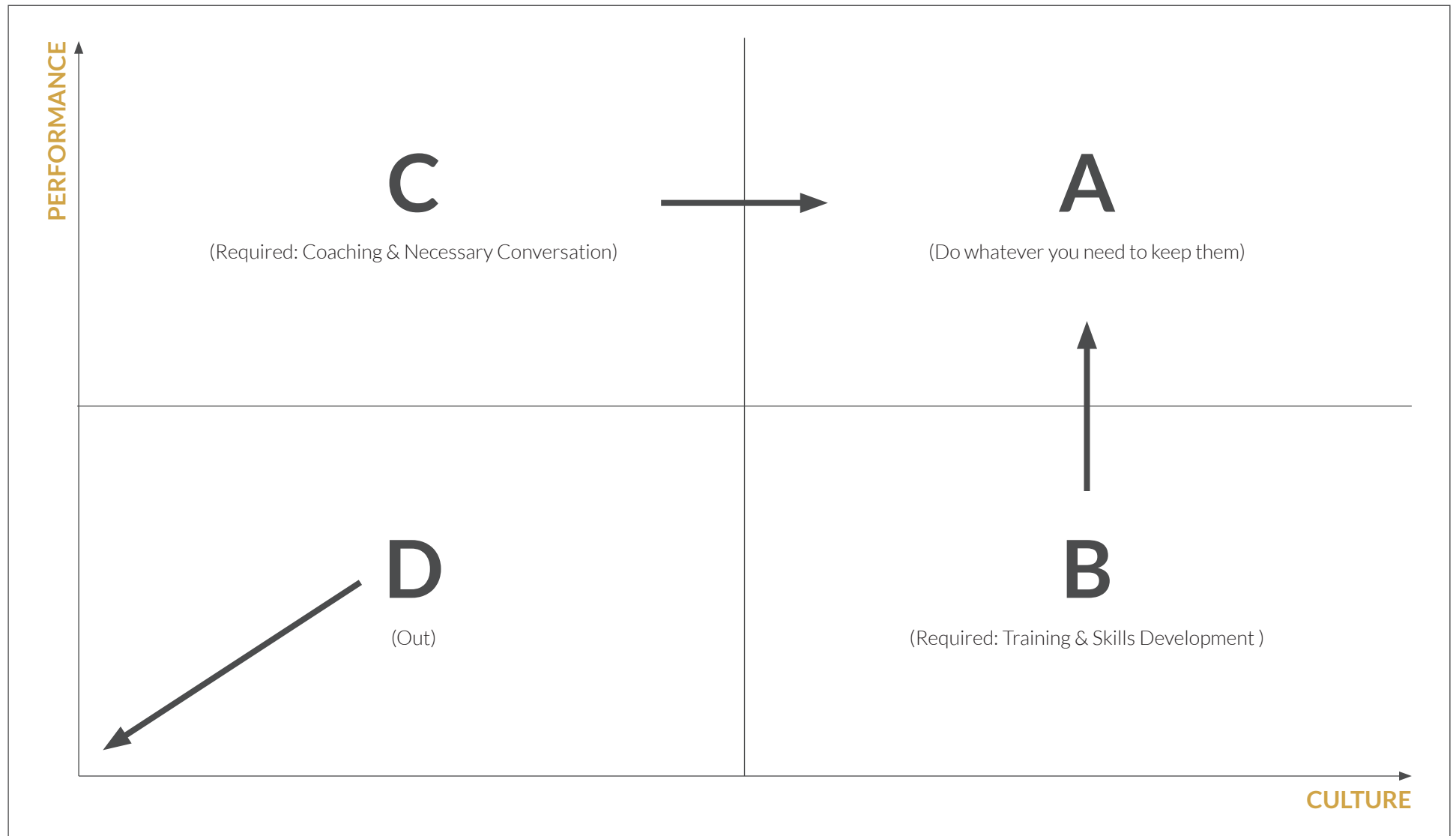
INSIGHTS AND ACTIONS

| MODULE | INSIGHTS / TAKEAWAYS | ACTIONS |
|----------------------------|----------------------|---------|
| Next Level Communication | | |
| Polish your Presentation | | |
| Handover with Care | | |
| Meet with Purpose | | |
| Structure Appointment Book | | |

FRONT DESK HEROES

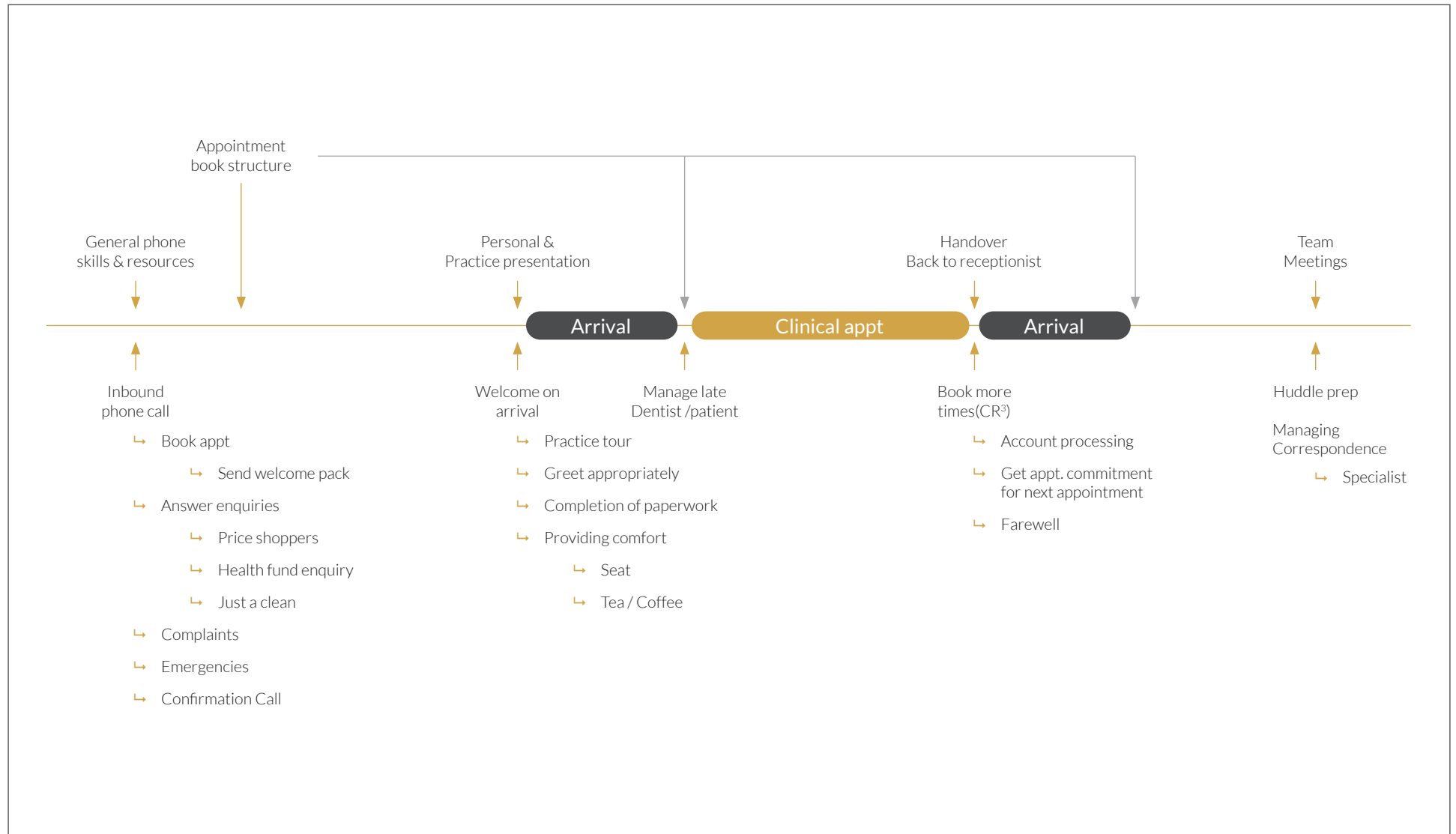


THE PERFORMANCE CULTURE MATRIX



Inspired by Keith Cunningham

ROCKSTAR YOUR RECEPTION



NOTES

NEXT LEVEL COMMUNICATION

FRAMEWORK COMPONENTS

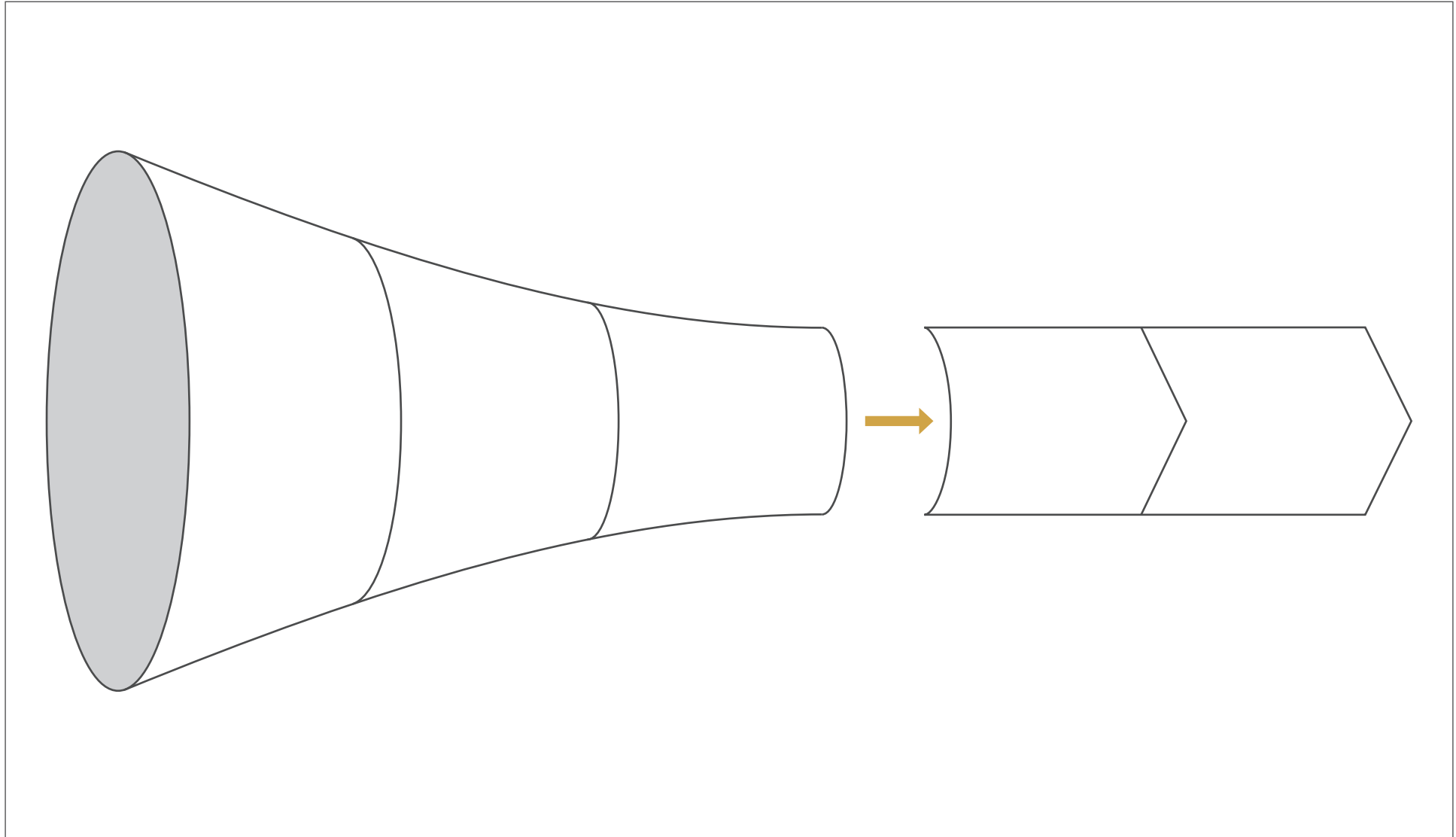
| SMART QUESTIONS | DELIBERATE STATEMENTS |
|--|--|
| <p>Open questions to engage</p> <ul style="list-style-type: none">• Tell me more about that?• How does that impact you?• Then what happens?• How did you come to that? <p>Closed questions to confirm and move forwards</p> <ul style="list-style-type: none">• How does that sound?• Does that make sense?• Is that Ok ?• Does that work for you? | <p>To inform the patient</p> <ul style="list-style-type: none">• You have a large cavity in the tooth...• Please take a card and give it to ...• The fee ranges between ...• I noticed that ... <p>To position the offer</p> <ul style="list-style-type: none">• You might remember that I said I would ...• The advantage with that option is...• You might not realise that ...• I can see how that would be frustrating for you ... |

SIMPLE FRAMEWORKS

| GREETING | PUTTING SOMEONE ON HOLD | CONFIRMING APPOINTMENT |
|---|---|--|
| <p><i>"Thankyou for calling Bespoke Dental. This is Jesse. How may I help?"</i></p> | <p><i>"Bob, so that I can best help you, would you mind if I put you on hold for a moment?"</i></p> | <p><i>"Hi Bob, it's Jesse Green calling from Bespoke Dental. I just want to let you know we're looking forward to seeing you on Monday at 8 o'clock and wanted to know if there are any questions you have prior to that appointment with us?"</i></p> |
| <p><i>"How much is a crown"</i></p> | <p><i>"That's fine"</i></p> | <p><i>"I'll be there"</i></p> |
| <p><i>"Thanks again for calling. My name is Jesse and yours is ..."</i></p> | | <p><i>"Great! We're looking forward to seeing you on Monday at 8am."</i></p> |
| <p><i>"Bob"</i></p> | | <p><i>"See you then"</i></p> |

NOTES

PATIENT APPOINTMENT BOOKING FRAMEWORK

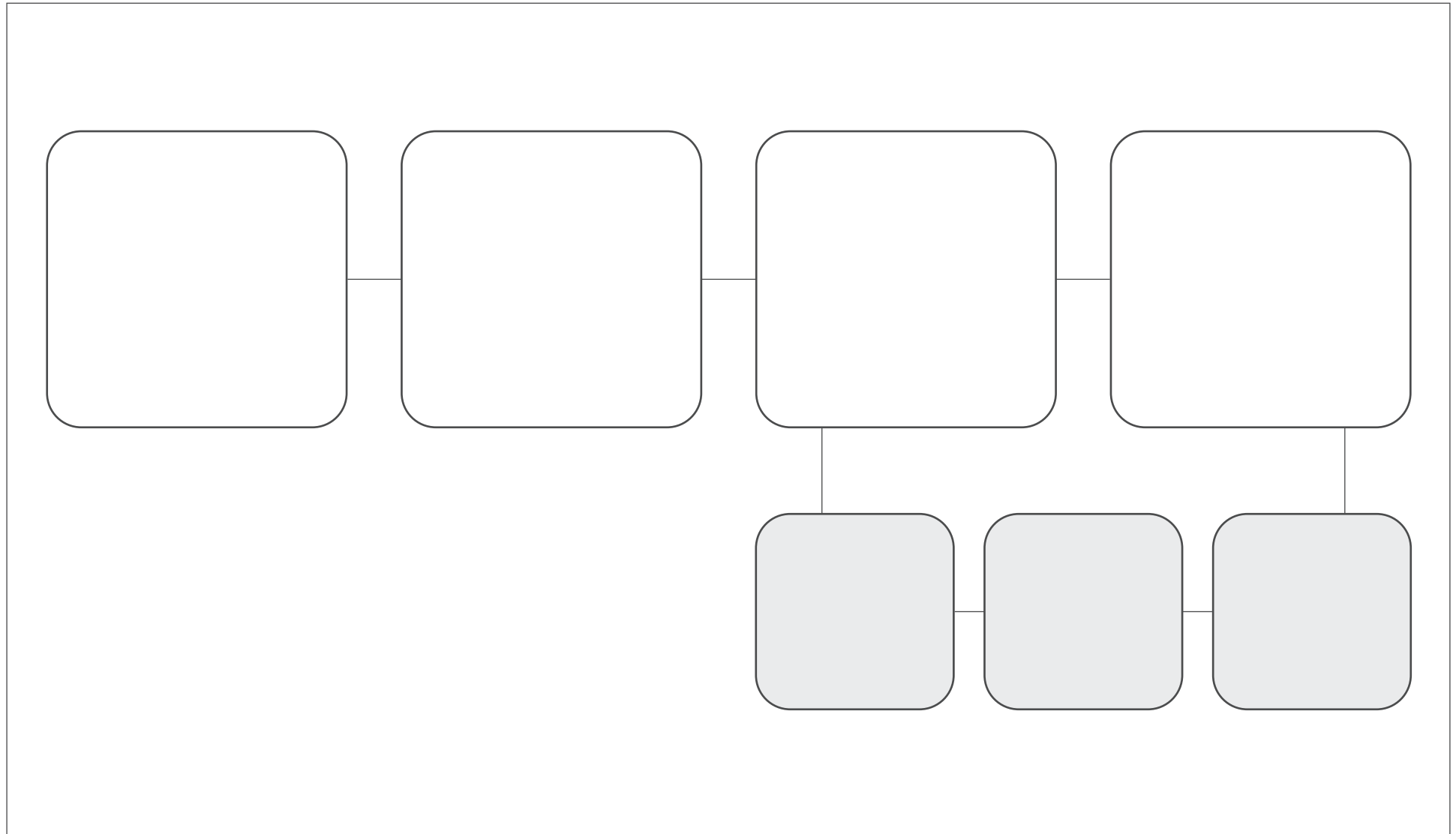


PATIENT APPOINTMENT BOOKING FRAMEWORK

| CHOICE OF 2 | | |
|---|---|--|
| DAYS | MORNING OR AFTERNOON | POTENTIAL TIMES |
| <p>Bob, when it comes to making an appointment, which days of the week work best for you?</p> | <p>And do you prefer a morning or afternoon appointment?</p> | <p>Ok that's great</p> <p>I have Monday 3rd of February at 8am or Wednesday 5th February at 10am</p> <p>Which of those works best for you Bob?</p> |
| GAIN COMMITMENT | MULTIPLY BOOKING | FAREWELL |
| <p>That's great Bob. I have you booked in to see Dr. Green at 8am on Monday the 3rd of February</p> <p>So Bob, you'll be OK to keep that appointment?</p> <p>OR</p> <p>So Bob, will you be there?</p> | <p>Now that I have you on the phone, and its easy and convenient for you, is there anyone else in the family who needs an appointment while we are at it?</p> | <p>Bob, its been nice to talk to you.</p> <p>See you on Monday the 3rd of Feb.</p> <p>Have a great day</p> |

NOTES

DEALING WITH CANCELLATIONS



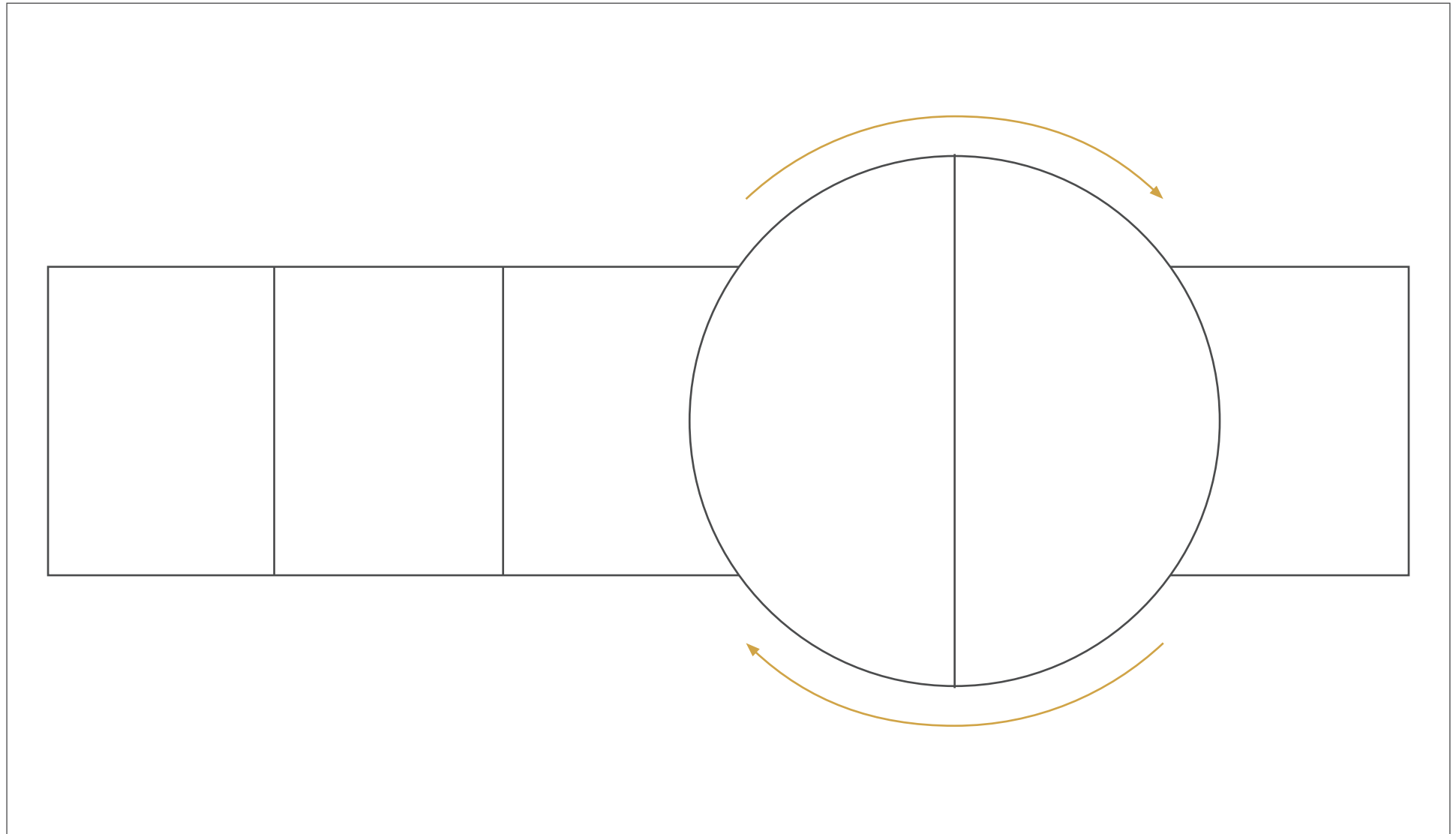
DEALING WITH CANCELLATIONS

| PUT ON HOLD | OFFER COMPELLING REASON | KEEP APPOINTMENT? | GAIN COMMITMENT |
|--|--|--|--|
| | <p><i>Thanks for calling today</i></p> <p><i>I see from your file that you've recently had pain on the upper left hand side. In order to avoid another episode like that Dr. Green really needs to attend to the cavities as soon as possible</i></p> | <p><i>Is there any way you can make today's appointment?</i></p> | <p><i>Thankyou Mrs. Smith, we're looking forward to seeing you . . .</i></p> <p><i>I have you confirmed for that appointment.</i></p> <p>OR</p> <p><i>So, you'll be OK to keep that appointment?</i></p> |
| IF REBOOK APPOINTMENT | PERMISSION TO CALL | REPEAT OFFENDERS | |
| <p><i>I understand. Let's schedule a time that works</i></p> <p><i>(See Patient Appointment Booking Framework and use cascading series of alternate choices)</i></p> <p>Note: Gain commitment is more strict "Can you promise me . . ."</p> | <p><i>I understand you don't have diary</i></p> <p><i>If I haven't heard from you in a few days how about I check in to see where you are up to</i></p> <p><i>(Few days later)</i></p> <p><i>Hi Mrs. Smith, Its Jesse from Bespoke Dental. I'm calling back as I promised I would.</i></p> | <p><i>Mrs. Smith, when you first came to our practice, I indicated that our philosophy is to be as comprehensive in our approach to dental treatment as possible.</i></p> <p><i>When you keep cancelling your appointment at short notice, it hinders our ability to provide the level of care our patients have come to enjoy and expect. Moving forwards, I really need you to attend the appointments that you schedule with our practice.</i></p> <p><i>Can you help me with that?</i></p> | |

DEALING WITH CANCELLATIONS

| PUT ON HOLD | OFFER COMPELLING REASON | KEEP APPOINTMENT? | GAIN COMMITMENT |
|-----------------------|-------------------------|-------------------|-----------------|
| | | | |
| IF REBOOK APPOINTMENT | PERMISSION TO CALL | REPEAT OFFENDERS | |
| | | | |

DEALING WITH COMPLAINTS



COMPLAINT HANDLING SYSTEM

Map Your Practice's Complaint Handling Process

| | Where/Who | How do I know when this step is complete? |
|--|-----------|---|
| STEP 1 Use a framework for handling the complaint conversation and gathering information | | |
| STEP 2 Record and log the complaint | | |
| STEP 3 Appoint staff member to handle the complaint from start to finish | | |
| STEP 4 Gather internal information - clinical records, interview staff etc | | |
| STEP 5 Present information to practice principal. | | |
| STEP 6 Decide if complaint warranted. If complaint warranted, decide what remedy will be offered to patient | | |
| STEP 7 Identify improvements to be made. Create and document systems / SOP's where possible | | |
| STEP 8 Team training re complaint (if appropriate) and any systems to be modified or implemented. | | |
| STEP 9 Communicate with complainant (using a framework) to outline remedy and improvements made from the exercise | | |

DEALING WITH COMPLAINTS

| ACKNOWLEDGE GRIEVANCE | VALIDATE | THANK YOU |
|---|---|---|
| <p><i>To confirm, what I understand is happening is . . .</i></p> <p><i>Am I correct?</i></p> | <p><i>I can see how that would be frustrating for you</i></p> | <p><i>And I'm sorry that's you have had this experience</i></p> <p><i>Thankyou for calling me about that</i></p> |
| WANTS | TEST POSSIBLE SOLUTION | NEXT STEPS |
| <p><i>Where would you like to go from here?</i></p> | <p><i>So if we were to do A + B + C, would that work for you?</i></p> | <p><i>So here is what we will do from here</i></p> <p>A</p> <p>B</p> <p>C</p> <p><i>How does that sound?</i></p> |

DEALING WITH COMPLAINTS

| ACKNOWLEDGE GRIEVANCE | VALIDATE | THANK YOU |
|-----------------------|------------------------|------------|
| | | |
| WANTS | TEST POSSIBLE SOLUTION | NEXT STEPS |
| | | |

NOTES

NOTES

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PRICE SHOPPER FRAMEWORK

| GREETING | REFRAME | TRANSITION |
|---|---|---|
| <p><i>Thank you for calling Bespoke Dental. My name is Jesse how may I help you?</i></p> <p><i>Thanks again for calling. My name is Jesse, and yours is . . ?</i></p> | <p><i>It's hard to give you an exact answer because the price varies with the complexity of the treatment and the material used</i></p> <p><i>However, using past patients as a guide, I can say the fee would be between \$1200 and \$1800 depending on your circumstances</i></p> | <p><i>How does that compare to the prices you have already?</i></p> |
| REDIRECT & OFFER | TEST FOR ACCEPTANCE | BOOK APPOINTMENT |
| <p><i>Well Bob, what we do for all our other patients and what I'd suggest we do for you is to schedule a consultation with Dr. Green</i></p> <p><i>He'll have a look at the tooth and go over all the treatment options with you, including their pros and cons and then give you an exact fee rather than a ballpark estimate</i></p> | <p><i>How would that work for you?</i></p> | <p><i>(See Patient Appointment Booking Framework and use cascading series of alternate choices)</i></p> |

PRICE SHOPPER FRAMEWORK

| GREETING | REFRAME | TRANSITION |
|------------------|---------------------|------------------|
| | | |
| REDIRECT & OFFER | TEST FOR ACCEPTANCE | BOOK APPOINTMENT |
| | | |

PREFERRED PROVIDER FRAMEWORK

| GREETING | REFRAME | TRANSITION |
|---|---|---|
| <p><i>Thankyou for calling Bespoke Dental. My name is Jesse how may I help you?</i></p> <p><i>Thanks again for calling. My name is Jesse, and yours is . . ?</i></p> | <p><i>Suzie, that is a really great question. We have lots of patients at our practice who have their insurance with BUPA (or similar company) even though we don't participate in that particular scheme</i></p> | <p><i>But would you be interested to know why those patients come here?</i></p> |
| REDIRECT & OFFER | TEST FOR ACCEPTANCE | BOOK APPOINTMENT |
| <p><i>Well, what they us is that they appreciate the care and service we offer.</i></p> <p><i>That's why they prefer to come here.</i></p> <p><i>And we are still happy to help you process your claim so you get the maximum benefit from your insurance company</i></p> | <p><i>How would that work for you?</i></p> | <p><i>(See Patient Appointment Booking Framework and use cascading series of alternate choices)</i></p> |

PREFERRED PROVIDER FRAMEWORK

| GREETING | REFRAME | TRANSITION |
|------------------|---------------------|------------------|
| | | |
| REDIRECT & OFFER | TEST FOR ACCEPTANCE | BOOK APPOINTMENT |
| | | |

HYGIENE ONLY FRAMEWORK

| GREETING | REFRAME | TRANSITION |
|---|--|--|
| <p><i>Thankyou for calling Bespoke Dental. My name is Jesse how may I help you?</i></p> <p><i>Thanks again for calling. My name is Jesse, and yours is . . ?</i></p> | <p><i>Well Debbie, it sounds like it's important for you to keep your mouth as healthy as possible. Am I correct to assume that?</i></p> <p><i>"Yes"</i></p> <p><i>Well, you have come to the right place because that's what we want for our patients too</i></p> | <p><i>Debbie, as a new patient would you like me to share with you how a first appointment typically goes, and what we could do for you if it suits?</i></p> |
| REDIRECT & OFFER | TEST FOR ACCEPTANCE | BOOK APPOINTMENT |
| <p><i>Like you, our philosophy is to be as thorough as possible, and maintain good health. That's why Dr Green prefers to start with a detailed examination at that appointment so that you both have a clear picture of everything that's going on in your mouth.</i></p> <p><i>From there, the two of you can discuss the next steps forward, which is usually a clean, which we would schedule on that day as well</i></p> | <p><i>How does that sound to you?</i></p> <p>IF NO</p> <p><i>Great, we can do just the clean. While I have you on the phone and its easy and convenient, would you like me to schedule an examination whilst you are at it?</i></p> | <p><i>(See Patient Appointment Booking Framework and use cascading series of alternate choices)</i></p> |

HYGIENE ONLY FRAMEWORK

| GREETING | REFRAME | TRANSITION |
|------------------|---------------------|------------------|
| | | |
| REDIRECT & OFFER | TEST FOR ACCEPTANCE | BOOK APPOINTMENT |
| | | |

NOTES

NOTES

ASKING FOR A REFERRAL OR REVIEW

| | | |
|---|--|--|
| <p>PREFRAME</p> <p><i>It's important to me that you have a good experience. So at the end of today's appointment, I'd like to ask how it went for you.</i></p> | <p>APPOINTMENT</p> | |
| <p>REMINDE OF PRE-FRAME</p> <p><i>Mrs Jones, do you remember at the beginning of the appointment, I said I'd ask for some feedback?</i></p> | <p>ASK THEIR EXPERIENCE</p> <p><i>Can you tell me how the experience was for you today?</i></p> | <p>THANK THEM</p> <p><i>Thanks so much for that. I've enjoyed the visit too</i></p> |
| <p>PHILOSOPHY</p> <p>REFERRAL: <i>You might not realise that we are primarily referral based and we are selective about who we take on as patients"</i></p> <p>REVIEW: <i>You might not know that some people feel uncomfortable coming to the dentist</i></p> | <p>ASK THE FAVOUR</p> <p>REFERRAL: <i>But if you have any family or friends you'd like us to look after on your behalf, we'd be happy to do so</i></p> <p>REVIEW: <i>If I give you link, can you share your experience so that others understand that its an enjoyable experience</i></p> | <p>NEXT STEPS</p> <p>REFERRAL: <i>Please take a card and offer it to whomever you have in mind"</i></p> <p>REVIEW: <i>We'll text / email you the link, and can you write one or 2 sentences and all you need to do is hit the 'post' button</i></p> |

ASKING FOR A REFERRAL OR REVIEW

| | | |
|-----------------------------|-----------------------------|-------------------|
| PREFRAME | APPOINTMENT | |
| REMINDE OF PRE-FRAME | ASK THEIR EXPERIENCE | THANK THEM |
| PHILOSOPHY | ASK THE FAVOUR | NEXT STEPS |

NOTES

NOTES

POLISH YOUR PRESENTATION

THE PERFECT PRESENTATION AUDIT

Put your self in the shoes of a patient in the waiting room of your practice. What do they see, hear, smell, and what Physical comforts are available to them. ✓ For yes. ✗ For no. ? For not sure.

| | SEE | HEAR | SMELL | USE |
|---------------------------------------|---|---|---|--|
| ACCEPTABLE STANDARD PROS | <ul style="list-style-type: none"> □ Welcome signage clear and clean □ Well presented team (hair tidy, clean uniforms, hemmed trousers -not dragging on floor, polished shoes, etc) □ Clear reception desk - uncluttered □ Professional signage (not printed and laminated word docs) □ Clean doorknobs, walls, windows, benches, tables, corners, glass etc □ Interesting entertainment (TV, reading, etc) | <ul style="list-style-type: none"> □ Pleasant Music □ Warm greetings for all patients – not obviously warmer greetings for a favourite patient □ Patient Names used □ Wait times being warmly explained □ Professional phone manner heard when team are answering calls □ Low level ring volume on incoming calls | <ul style="list-style-type: none"> □ Clean, pleasant smell on entry □ Fresh linen or citrus from odour control devices especially where limited fresh air is available □ Coffee or herbal teas provided to patients □ Whole of reception is fresh and consistently nice smelling □ Team members have pleasant personal body odour – no smoke □ Toilets if available smell fresh | <ul style="list-style-type: none"> □ Clean toilets if available □ Comfortable and consistent temperature throughout practice □ A place to hang jacket coathanger - not on top of other patients jackets □ Comfortable well spaced seating □ Clean Clipboards & pens for forms □ Cups available at water fountain |
| UNACCEPTABLE STANDARD CONS | <ul style="list-style-type: none"> □ Sticky notes or messages attached to reception desk or computers □ Dead plants, wilted flowers, plastic flowers that look plastic or are dusty, dirty vases □ Disorganised waiting room, visible rubbish or tidy bins, cardboard boxes □ Lunch wrapper or drink cups on desk □ Team eating food □ Team cleaning or talking out rubbish | <ul style="list-style-type: none"> □ “Nerve twitching” noises of clinical equipment □ Disruptive or sudden noises, banging, vacuuming, □ Too loud – music, talking or TV □ Slamming doors □ Children causing chaos □ Team whispering about anything at all | <ul style="list-style-type: none"> □ Smell of cigarette smoke on team members post smoking breaks □ Microwaved food from the team tea room □ Medical/clinical odour from surgery or lab areas □ Culturally specific odour of team such as strong food/cooking odour □ Heavy perfume of team members □ Foul smells of practice environment | <ul style="list-style-type: none"> □ Worn out magazines □ No water or cups available □ Dusty soft furnishings such as bench seat cushions □ Stained cups or teaspoons □ Grubby or faulty payment terminals □ Practice patient car park dirty |

PROFESSIONAL LANGUAGE

- Frame it in the positive
- Say what you can do, avoid what you can't
- Use professional language

I can't do that

.....

Do you have another time I can call

.....

She's unavailable right now

.....

He's in a meeting

.....

I can't advise, I just make appointments

.....

We are booked up this week

.....

We are really busy at the moment

.....

I'm sorry, you'll have to wait

.....

I'm sorry I can't help you

.....

I can't handle that enquiry

.....

Thanks

.....

Can you give me your surname

.....

How do you spell that

.....

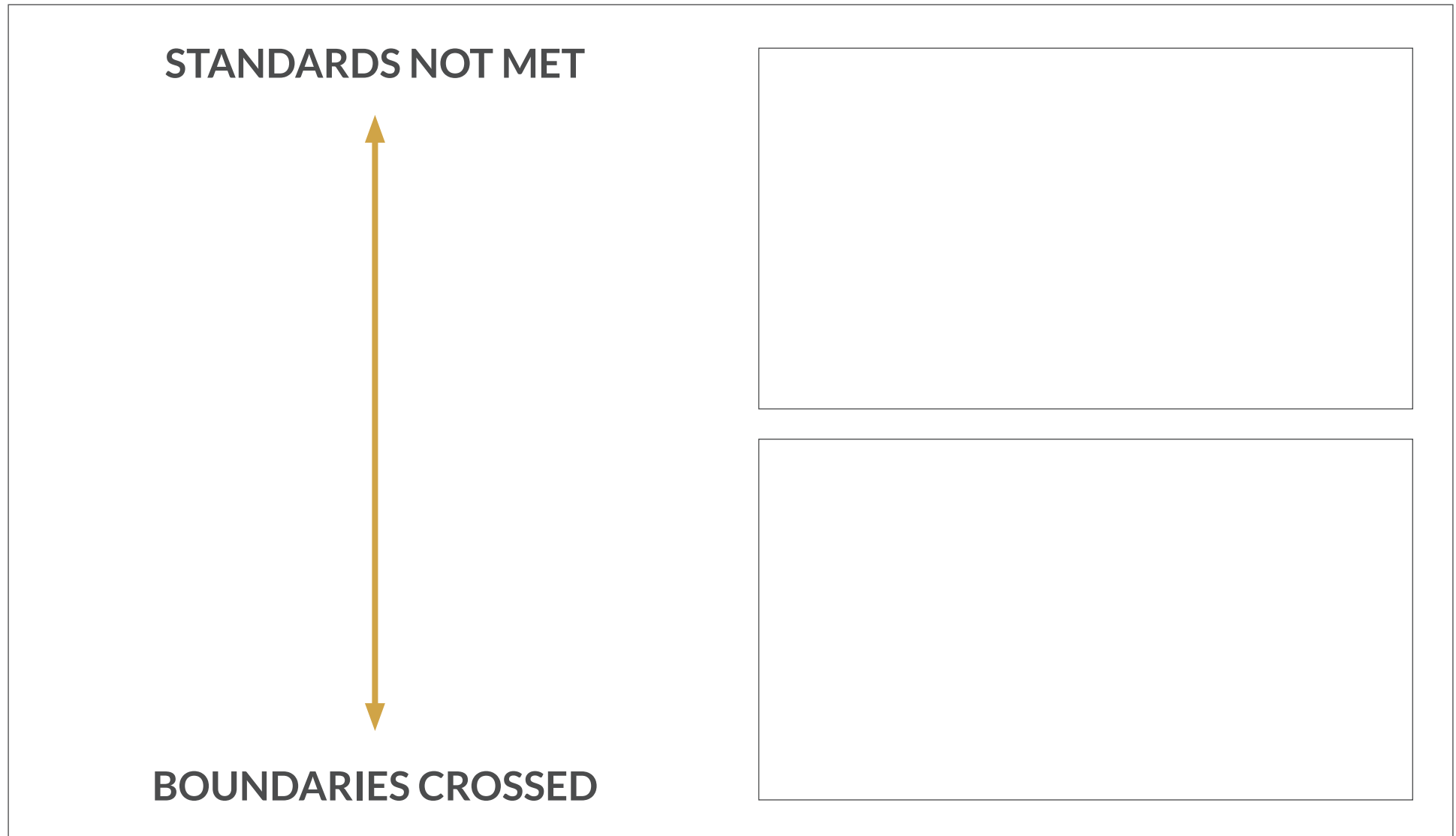
Did you want the fax number

.....

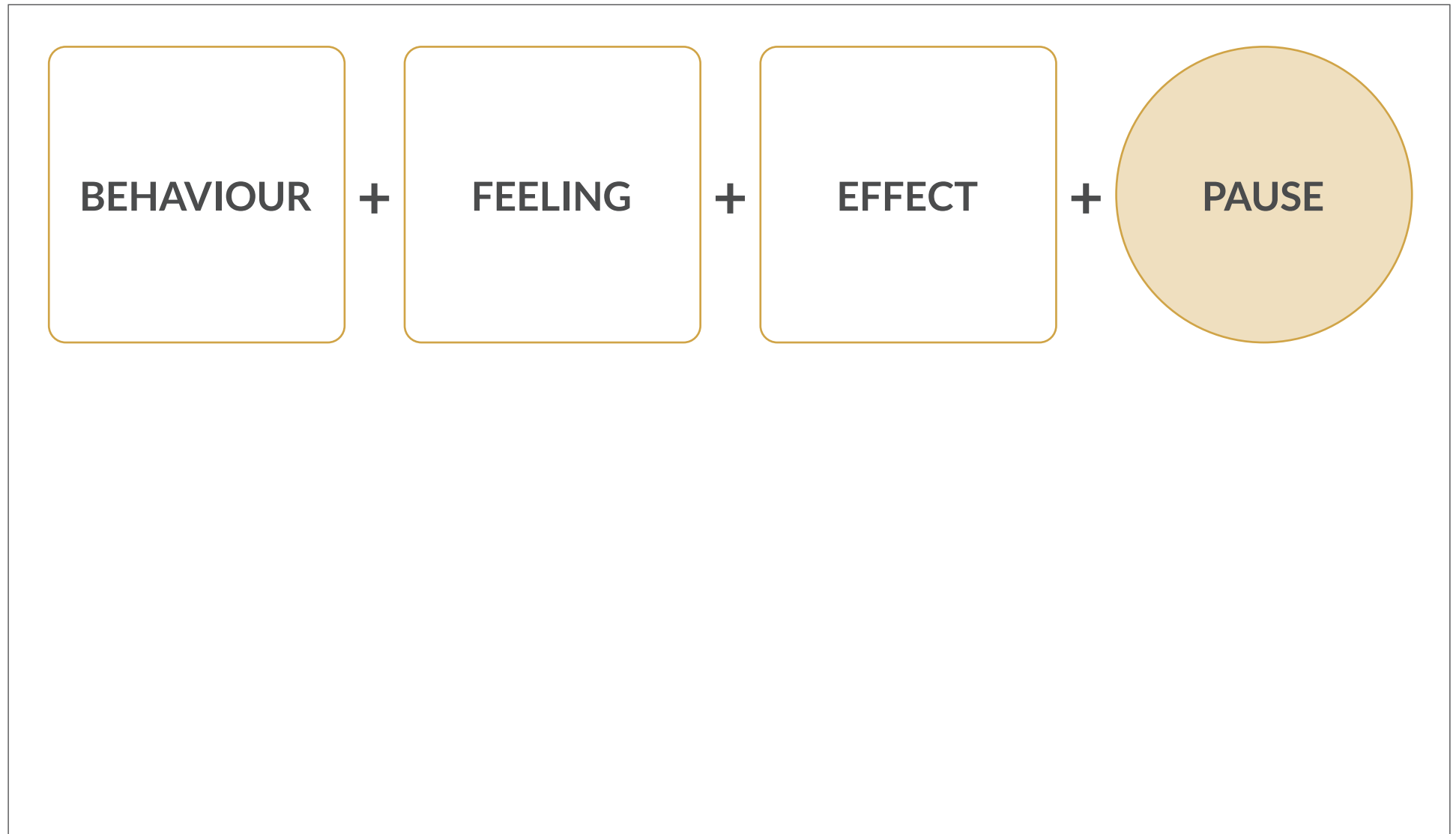
I'll just put you on hold

.....

BOUNDARIES & STANDARDS



I-MESSAGES



I-MESSAGES

I-MESSAGE EXERCISE

Write I-Messages to diffuse for three conflict situations in your workplace.

1.

2.

3.

NOTES

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HANDOVER WITH CARE

A COMPELLING REASON TO RETURN



A COMPELLING REASON TO RETURN

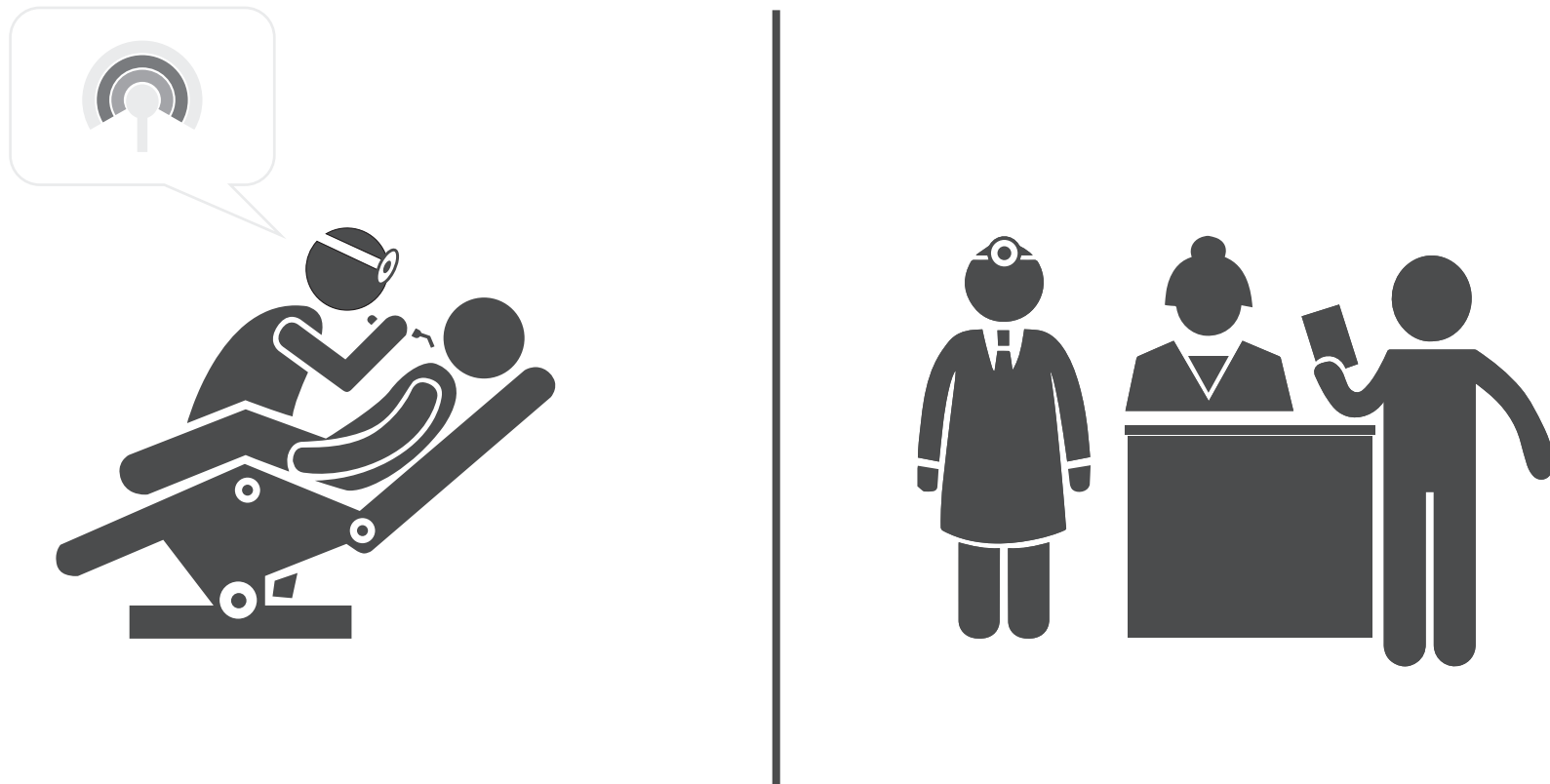
| FRAMEWORK | SAMPLE 1 | SAMPLE 2 | SAMPLE 3 |
|---|---|-----------------------------------|-------------------------|
| Problem | Crack on lower molar | Gum pockets (Gingival pockets) | Tooth decay (Caries) |
| Consequence | Propagate | | |
| Implication | Nerve problem Tooth break | | |
| Seed concern & potential treatment | Because if it has, we will want to jump on it before it becomes an issue. | | |

A COMPELLING REASON TO RETURN

| FRAMEWORK | SAMPLE 1 | SAMPLE 2 | SAMPLE 3 |
|------------------------------------|------------|----------------|--|
| Problem | Tooth wear | Tooth movement | Shadow on the x-ray (Periapical lesion) |
| Consequence | | | |
| Implication | | | |
| Seed concern & potential treatment | | | |

NOTES

PATIENT HANDOVER



PATIENT HANDOVER

| | | | |
|---|--|---|---|
| 1 PASSING MEMBER TO RECEIVING MEMBER | CELEBRATE PATIENT <i>Bob has done really well today. We covered a lot of territory</i> <i>The filling today was bigger than expected and I'm glad we got it done, because had we left it, it almost certainly would have given Bob problems</i> | COMPELLING REASON <i>My worry is that ...</i> <ul style="list-style-type: none"> • problem • consequence • implication • seed concern | NEXT STEPS <i>Our next step is to book an appointment.</i> <i>Mary, can you please find a time for Bob in Feb that works.</i> <i>It's really important that we see him at that time and that it doesn't slide</i> |
| 2 PASSING MEMBER TO PATIENT | COMPELLING REASON <i>Bob, given today's filling was bigger than expected</i> <ul style="list-style-type: none"> • problem • consequence • implication • seed concern | NEXT STEPS <i>So let's get that appointment booked in ASAP. We just don't want a drama</i> OR <i>Let's get that appointment booked in today and that way its locked and loaded. Its important this doesn't slip</i> | EDIFY & EXIT <i>Mary is an expert at finding a time that will sync well with your diary and ours.</i> <i>Is there anything you need from me before I leave you with Mary?</i> |
| 3 RECEIVING MEMBER TO PATIENT | TEST UNDERSTANDING <i>So Bob, Dr. Green mentioned that you prefer a morning appointment and that he needs 45 mins to get that procedure done</i> | COMPELLING REASON <i>He's keen to get that done ASAP because he's worried about ...</i> <ul style="list-style-type: none"> • problem • consequence • implication • seed concern | BOOK APPOINTMENT <i>(See Patient Appointment Booking Framework and use cascading series of alternate choices)</i> |

PATIENT HANDOVER

| | | | |
|--|--------------------|-------------------|------------------|
| 1 PASSING MEMBER TO RECEIVING MEMBER | CELEBRATE PATIENT | COMPELLING REASON | NEXT STEPS |
| 2 PASSING MEMBER TO PATIENT | COMPELLING REASON | NEXT STEPS | EDIFY & EXIT |
| 3 RECEIVING MEMBER TO PATIENT | TEST UNDERSTANDING | COMPELLING REASON | BOOK APPOINTMENT |

TALKING MONEY

| COMPARISON | SAMPLE \$1339 | Notes |
|--|---|-------|
| Large vs small | That will be One thousand three hundred and thirty nine dollars That will be thirteen thirty nine | |
| Discount vs courtesy adjustment | I can discount \$100 from that fee. I'm happy to make a courtesy adjustment to \$1239 | |
| Exact amount vs Range | That treatment will cost \$1339 That treatment will cost somewhere between \$1300 - \$1500 | |
| Itemised vs collated | Item A costs \$839 + item B costs \$500 = 1339 Item A + B = \$1339 | |
| Guarantees / warranties with accountability | That work is guaranteed for 5 years That work is guaranteed for 5 years on the provision that you attend a check up every 6 months | |

NOTES

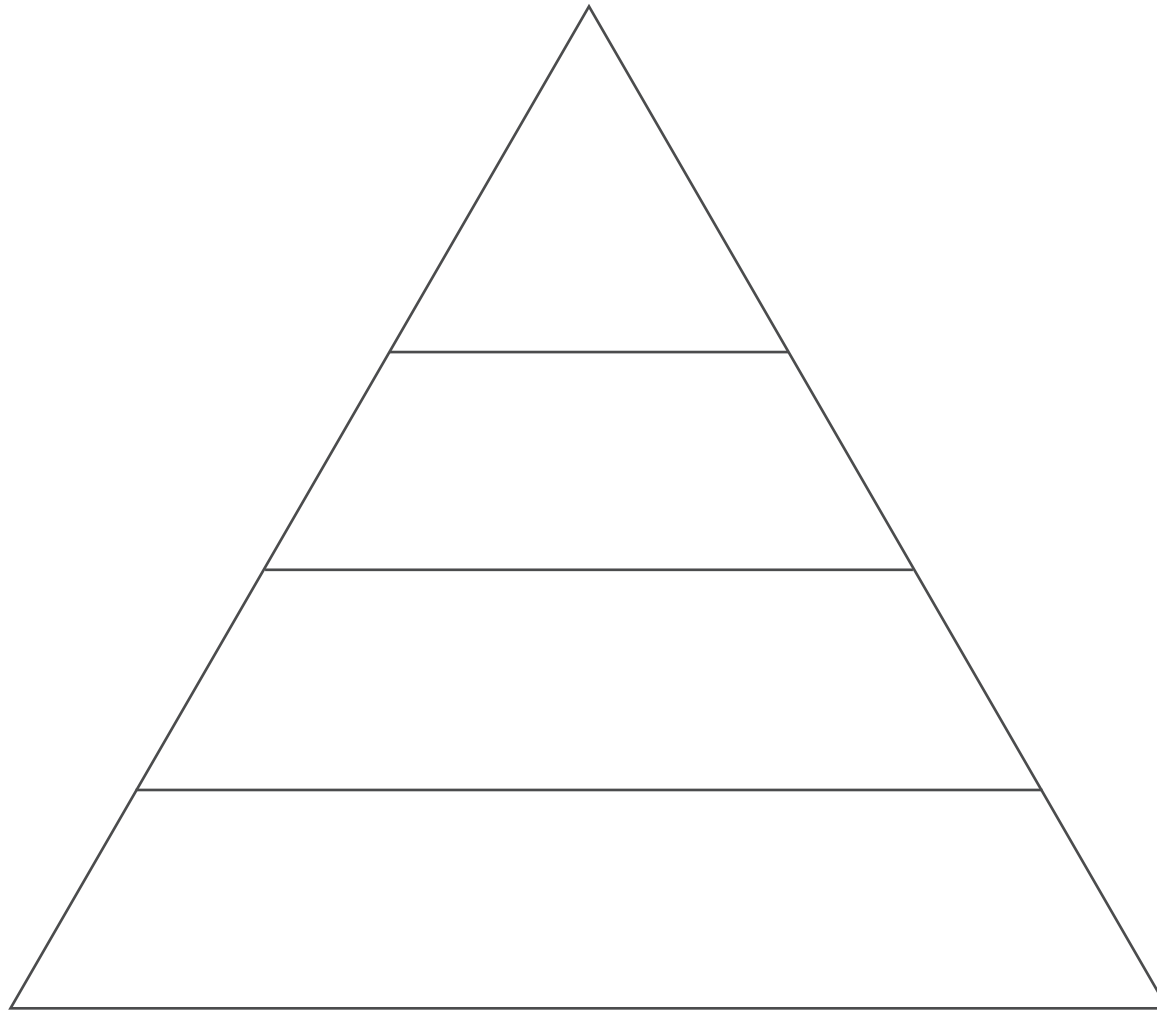
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NOTES

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MEET WITH PURPOSE

MEETING RHYTHM



THE MORNING HUDDLE – AGENDA & FLOW

1. YESTERDAY (R / DA / H)

- Our one Big Win was:
- Number follow-up calls completed:
- One thing we could improve is (what & how):

2. TODAY (R / DA / H)

- Relevant patient information (patient file / treatment / marketing / delight):
- Problems that might arise today are:
- Appointment opportunities are (catch up / emergencies / checks):

3. NEXT APPT (R / DA / H)

- Production pre-block (next appt. & 3 potential patients)
- New patient exam (next appt.)
- Minor restorative (next appt.)
- Emergency Time (next appt. & team member)
- Hygiene only (next appt.)

4. FINANCES (R)

- Our Daily goal is per provider is:
- Yesterday each provider did \$
- Today we expect \$
- Brainstorm shortfalls:

5. LAB WORK (R)

- Lab work due today (has it arrived):
- Outgoing today is (booked and form complete):
- Internal lab materials available (eg. Cerec blocks):

6. MARKETING (R / DA)

- Results from yesterday's referrals are:
- Today We are asking these people for referrals or reviews:
- Our one 'patient delight' focus for today is:

7. ABOVE THE LINE (E)

8. CLOSING STATEMENT (D)

9. RATE THE MEETING (E)

R: Receptionist
DA: Dental Assistant
H: Hygienist / OHT

D: Dentist
E: Everyone

HUDDLE PREPARATION FORM – FRONT DESK / PRACTICE MANAGER

YESTERDAY'S SCHEDULE

- ☐ The best thing that happened yesterday
- ☐ Follow up calls completed?
- ☐ What can be improved?

TODAY'S SCHEDULE

- | | |
|---|--|
| <input type="checkbox"/> Problem areas? | <input type="checkbox"/> ID patients needing follow up calls |
| <input type="checkbox"/> Relevant clinical information (e.g. regarding emergencies) | <input type="checkbox"/> When can emergencies be seen today? |
| <input type="checkbox"/> Significant past dental history | <input type="checkbox"/> Where are the opportunities to catch-up if required? |
| <input type="checkbox"/> Who needs a new medical history? | <input type="checkbox"/> Personal information about the patient that can be used to greet and engage the patient |

NEXT APPOINTMENTS

- | | |
|---|--|
| <input type="checkbox"/> Production pre-block (Bring a name of who could fill the next pre-block) | <input type="checkbox"/> Emergency time (flexible appointment or pre-blocked time) |
| <input type="checkbox"/> New patient exam | <input type="checkbox"/> Hygiene only |
| <input type="checkbox"/> Minor restorative | |

LAB WORK

- | | |
|---|---|
| <input type="checkbox"/> Confirm lab work for today is in | <input type="checkbox"/> Outgoing lab work booked with lab, lab forms completed |
|---|---|

FINANCES

- | | |
|------------------------------------|---|
| <input type="checkbox"/> Goal | <input type="checkbox"/> Major financial arrangements for new treatment |
| <input type="checkbox"/> Yesterday | <input type="checkbox"/> Patients in today with delinquent accounts |
| <input type="checkbox"/> Today | |

MARKETING

- ☐ Results from asking for referrals yesterday
- ☐ Who to ask for referrals today
- ☐ How to delight patients

NOTES

WEEKLY TEAM MEETING

| | | | |
|------------------------|--------------------------------|-----------------------|------------------------|
| DASHBOARD 20 MINS | PROGRESS REPORT GREEN / RED | ROADBLOCKS / STUCK | ACTION PLAN / STUCK |
| PROJECTS 40 MINS | PROGRESS REPORT GREEN / RED | ROADBLOCKS / STUCK | ACTION PLAN / STUCK |
| OTHER ITEMS 20 MINS | LIST AGENDA SORT BY IMPACT | ROADBLOCKS / STUCK | ACTION PLAN / STUCK |

THE RESULTS DASHBOARD

| KEY PERFORMANCE INDICATORS | | | | | | | | | | | |
|------------------------------|--------------------------|-------------|---------|--|----------|-----------------|--------------------------------|-------|-----|-------|-----|
| FINANCIAL PERFORMANCE | | | | | | | | | | | |
| TEAM | NUMBERS | | | UNITS OF PRODUCTION / PRE - BLOCKS | | CASE ACCEPTANCE | | | | | |
| | Total | Days worked | Per day | Planned | Filled | % | Outstanding Debts | | | | |
| Dr. 1 | \$ | | \$ | | | | Patients Lost | | | | |
| Dr. 2 | \$ | | \$ | | | | Emergencies booked for an exam | | | | |
| Dr. 3 | \$ | | \$ | | | | | | | | |
| NEW PATIENTS | | | | | | | | | | | |
| Total new patients: | Sources | Referral: | Web: | Advert: | Signage: | Other: | | | | | |
| CRITICAL DRIVERS | | | | | | | | | | | |
| MARKETING AND FULL BOOKS | Standard versus Achieved | | | OPERATIONS | | | | | | | |
| Asking for referrals | Standard: | Achieved: | | High Energy Huddle | | Standard: | Achieved: | | | | |
| Asking for reviews | Standard: | Achieved: | | Admin time cor rectly used | | Standard: | Achieved: | | | | |
| Multiply the bookings | Standard: | Achieved: | | Meaningful Team Meeting s | | Standard: | Achieved: | | | | |
| Build value for next visit | Standard: | Achieved: | | | | | | | | | |
| Next visit pre - appointment | Standard: | Achieved: | | | | | | | | | |
| Recalls sent | Standard: | Achieved: | | CASE ACCEPTANCE | | | | | | | |
| Incomplete Treatment | Standard: | Achieved: | | Present 3 units per day | | Dr. 1 | Y/N | Dr. 2 | Y/N | Dr. 3 | Y/N |
| Reactivation | Standard: | Achieved: | | Separate treatment consults for the week | | | | | | | |

THE WEEKLY TEAM – PROJECT PREP SHEET

PROJECT:

WINS

What success have you had

ACTION PLAN

PROGRESS

Are you on track to achieving your goal? Y/N

How do you know (measurables)?

ROADBLOCKS

Problems / frustrations / challenges / Decisions

What I need

What I have tried

What I haven't tried

What the owner / manager might do next?

THE WEEKLY TEAM – PROJECT PREP SHEET

PROJECT:

| | |
|-----------------|--------------------|
| WINS | ACTION PLAN |
| PROGRESS | ROADBLOCKS |

NOTES

NOTES

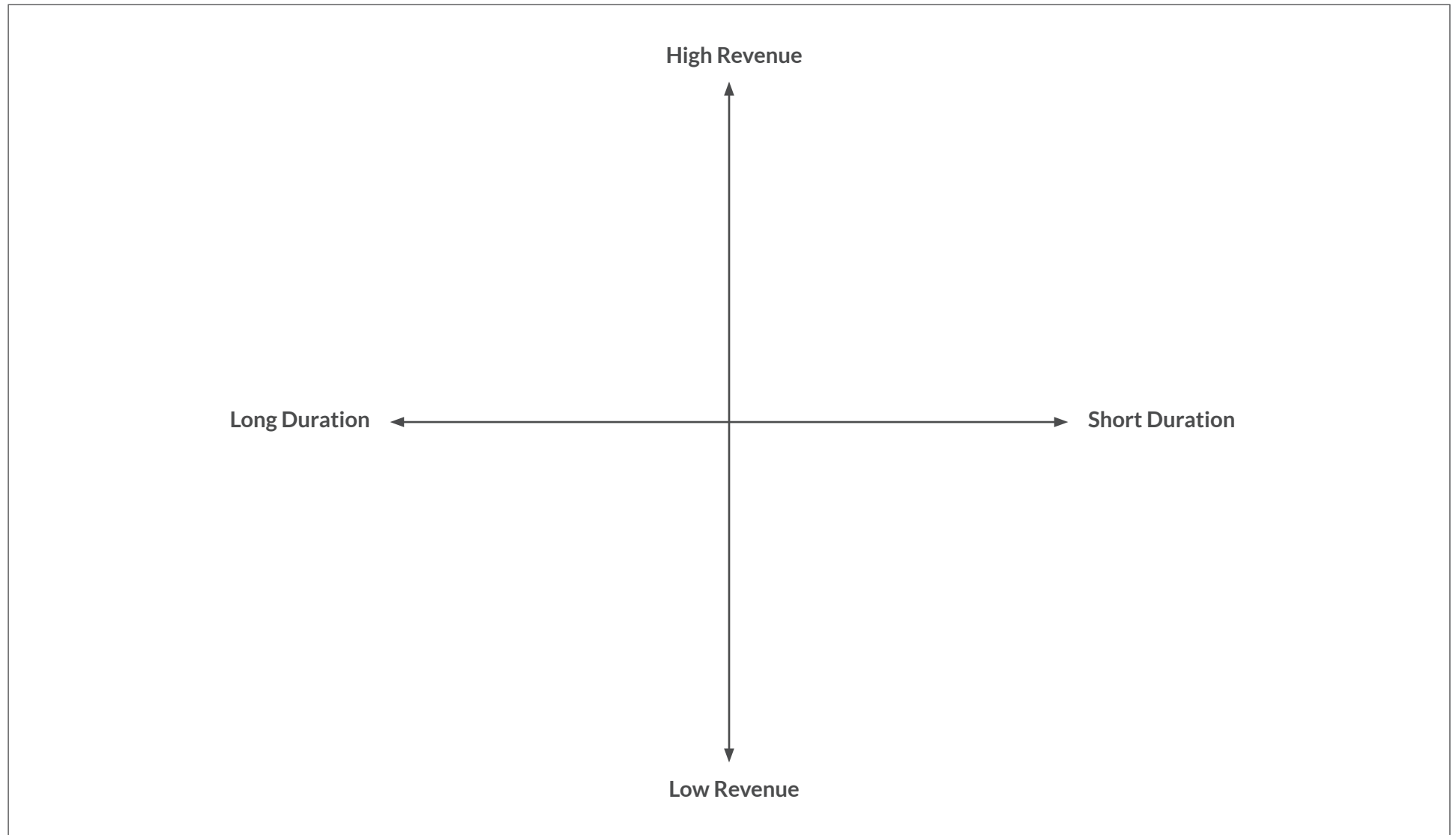
This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no text or other markings on the paper.

STRUCTURE APPOINTMENT BOOK

PRE-BLOCK YOUR APPOINTMENT BOOK

| CHAIR 1 | HYGIENE |
|---------|---------|
| | |
| | |
| | |
| | |
| | |
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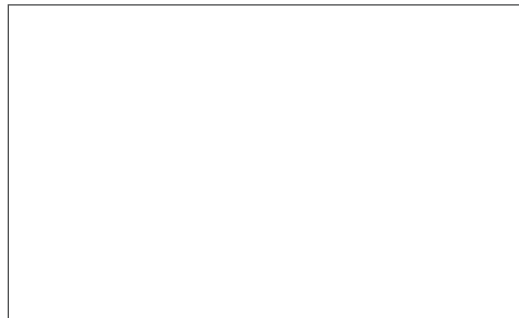
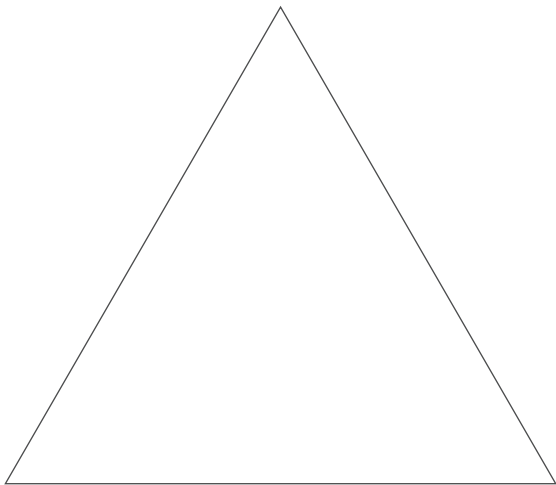
PRODUCTION PRE-BLOCKS



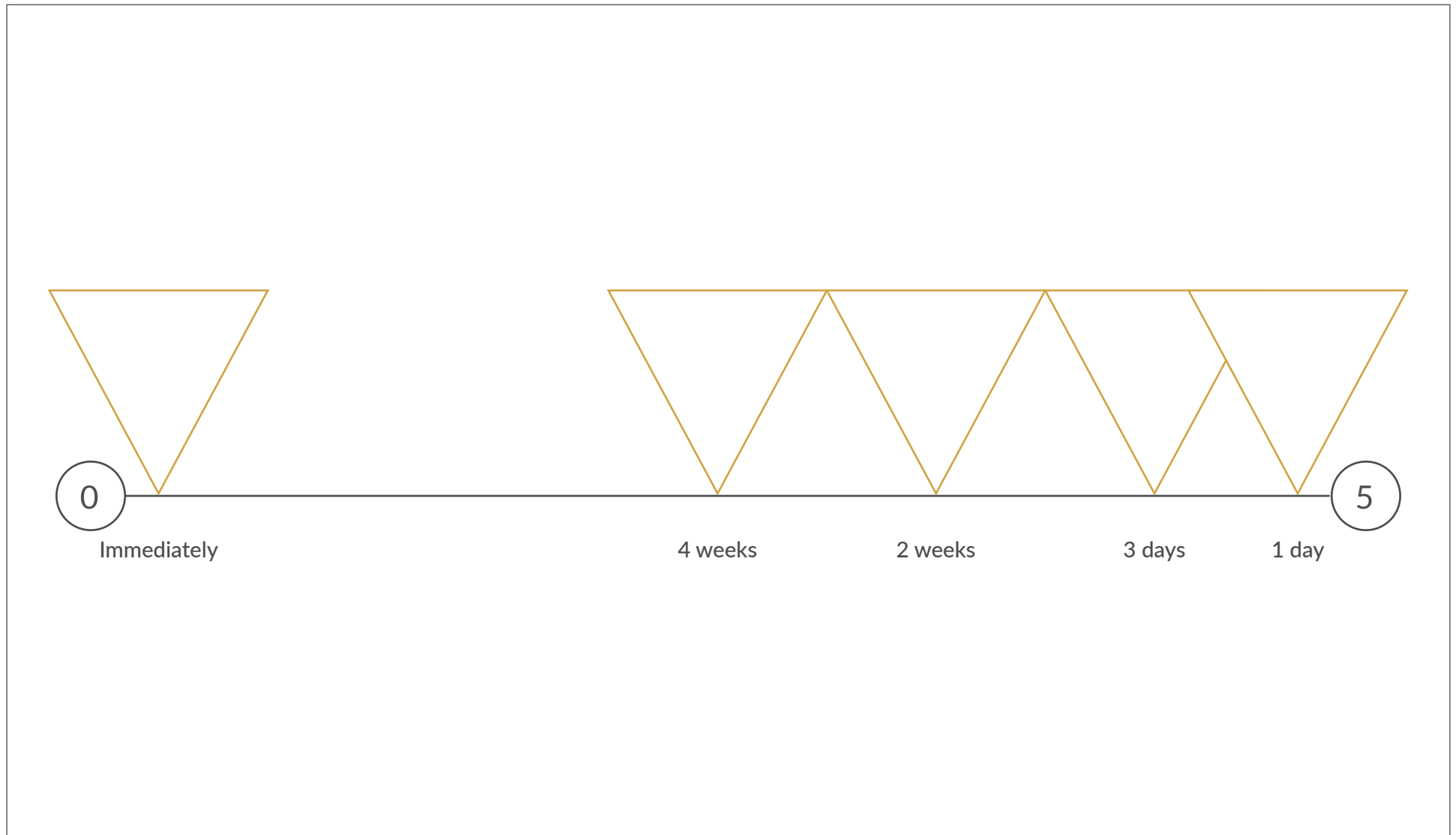
ADMINISTRATIVE TIME DUTIES

| FRONT OFFICE STAFF | DENTAL ASSISTANT | HYGIENIST / THERAPIST | DENTIST |
|---|--|--|--|
| <ul style="list-style-type: none"> • Prepare for the next morning huddle • Prepare charts PRN • Collection calls and letters • Inventory control • Phone calls to patients (confirmation of appointments) • Patient reactivation calls / letters • Assist other team members • Special projects | <ul style="list-style-type: none"> • Prepare for the next morning huddle • Sterilisation • Treatment room set up • Restocking of supplies • Inventory control • Lab duties • Patient post-op calls • Recall calls and letters • Patient reactivation calls / letters • Assist other team members • Special projects | <ul style="list-style-type: none"> • Prepare for the next morning huddle • Patient post-op calls • Patient reactivation calls and letters • Restocking of supplies • Sharpen instruments • Inventory control | <ul style="list-style-type: none"> • The ONE thing • Treatment planning • New patient calls • Patient post-op calls • Making and returning phone calls and emails • Staff development meeting • Staff coaching and counselling • Production and expense tracking reports • Planning monthly numbers meeting • Follow-up on staff assignments |

THE RECALL SYSTEM



THE 5 STAR REMINDER SYSTEM



NOTES

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