

Fee for Service Journey Checklist

→ *Stay on track!*



Intro Unit

- Consider & Define your WHYs
- Discuss your WHYs with those closest to you
- Define the Ins. Plans you have contracts with
- Define the # of patients you have on each contract
- Gather your contracts - read them
- Commit to an active NP marketing strategy
- Review your current marketing assets & liabilities
- Review the online & offline market analysis provided
- Review & consider the # of months estimated
- Make a decision to either begin or not begin a Fee for Service transition



"The first step towards getting somewhere is to decide you're not going to stay where you are."

- J.P. Morgan

Fee for Service Journey Checklist

→ *Unit 1!*



Unit 1

- Learn how to lead your team through this journey
 - Discuss your WHYs with your team as a group
 - Discuss and understand your team's WHYs
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- Prepare team to STOP pre-appointing all hygiene patients
 - Started blocking enough prime time slots for NPs
 - Discussed and executed how team will follow up with B & C patients moving forward
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- Print, frame, and hang the "Dental Insurance Defined" posters throughout office
 - Put up dry erase board in break room to show progress toward next milestone
 - Keep entire team accountable for NOT booking existing patients into NP blocks



Fee for Service Journey Checklist

↪ *Unit 2!*



Unit 2

- Understand the psychology of money, behavior, self-image, change, and stress
- Prepare for different bookkeeping habits
- Establish back-to-back checks and balances between your accounting and Practice Management Software
- Be aware and plan for new angles of embezzlement
- Consider renegotiating with the insurance plans which will take the longest to drop

- With your team make a list of priority, relatively inexpensive, physical improvements (paint, flooring, etc.) which will positively impact patient perception moving forward



Fee for Service Journey Checklist

→ *Unit 3!*



Unit 3

- Have your team provide you a list of tasks they handle on a daily basis along with approx. time to complete
- Rather than hiring additional people on your payroll, consider outsourcing the redundant human tasks required of your business team
- Look for every available opportunity to automate business processes within the task list your business team provided. Automate everything which will save your team time AND reduce the friction of being a patient in your practice



"Just because someone stumbles and loses their path, doesn't mean they're lost forever."

- Professor X

Fee for Service Journey Checklist

→ *Unit 4!*



Unit 4

- Assess each team member's smile. Ask each of them if there is anything they would like to improve. Begin improving their smile(s)
- Have the whole team make a BIG list of why your practice is best in town, in the country, state, or maybe even the country
- Role-play new patient insurance conversations with your team. Use scripting and the instruction provided in this course
- Role-play EXISTING patient insurance conversations with your team
- When you are within 60-90 days of sending your FIRST letter of resignation, begin to prepare the patients who have that first plan



Fee for Service Journey Checklist

→ *Unit 5!*



Unit 5

- Understand and begin to implement a reasonable and manageable social media strategy for your practice
- Take the time necessary to truly understand, reach, and message each market segment in dentistry. Implement your marketing accordingly
- Understand what marketing attribution is and why it is so vitally important to the whole journey, and potentially your entire career
- Live Instructor Syncs** - participate in as many live instructor sync meetings as possible. There is no replacement for going through these transitions WITH like-minded dentists
- Discussion Forums** - whenever you have a question, post it in the discussion forums. Everyone learns from the question and the answer

