

Relationship Monitors

Are the various members of your team connecting constructively with your patients at each stage of the patient/practice experience?

Relationship Monitors are interactive documents that measure the efforts made by each individual team member to nurture, develop and deepen relationships with your patients as they support the patients' pursuit of optimal dental health.

Relationship Monitors are designed to measure each team member's active contribution to improving relationships and how each patient interaction impacts the patient's overall experience, with the potential for building patient loyalty and

satisfaction. These Relationship Monitors are designed to complement existing statistical trend reports.

Each team member plays an important role in creating your practice's reputation for exceptional service and excellence in dental care. You and your team have a unique opportunity to make a significant difference in the lives of the patients you serve. It is a privilege to help patients feel listened to, understood, and respected.

With masterful communication skills and the use of the latest technology, you can help your patients:

- see and understand their current conditions;
- take ownership for their dental health;
- explore the many possibilities that modern dentistry offers;
- understand the implications of their options; and
- make healthy choices.

Teams support what they help to create; it gives them an emotional stake and a valuable sense of empowerment. Team members who have identified their core values and have a "richly imagined vision of the future" will strive willingly to achieve their goals. That becomes much easier to accomplish when they begin to plan the steps they will take, individually and as a group, to make that vision real.

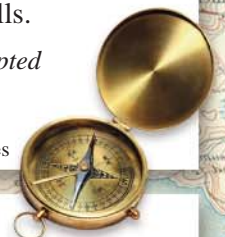
With clear goals and well-developed strategies for accomplishing them, team members can design unique, personalized monitors for each role, aimed at assessing the efforts they make on a daily basis to build healthy patient relationships, ensure patient satisfaction and loyalty, experience and enrich their own sense of personal fulfillment, and contribute to the practice's success.

How To Implement The Use of Relationship Monitors

Gather your team together for an energizing brainstorming session. After examining and discussing sample Relationship Monitors, each team member can create their own unique monitor, choosing the skills and systems they are striving to assess and improve. Once they have developed mastery in one area, they can redesign their monitor to focus on the next step in their development. This fun and empowering process has the potential to inspire every member's continued growth in relationship-building skills.

**See the attached sample of a personalized Hygiene Monitor, with a blank form to be downloaded and adapted for your use. Please contact us with your questions and/or unique ideas!*

Relationship Monitors • Terry Goss & Associates



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 **Terry Goss**
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Possible Interactive Relationship Monitor Topics

Relationship Monitors involving team members and patients are particularly powerful and effective. Here are some specific possibilities to consider:

Hygiene/Assistant Relationship Monitor Topics _____

- Smooth, information-rich hand-offs
- Introducing patients to new procedures (i.e. implants, cerac, lumineers, invisalign, etc.)
- Intra-oral camera and/or digital camera use
- Microscope slide, study models, checking shades
- Offering diagnostic services (visalite, diagnodent, bite eval, nutritional analysis etc.)
- Inviting patient back for comprehensive exam or reevaluation
- Soliciting feedback from patients
- Giving referral appreciation cards
- Hand-written 'Thank You' notes

Front Desk/Business Office Relationship Monitor Topics _____

- New patient satisfaction survey form
- Coming out from behind the desk to welcome and orient new patients in reception area
- Chart review priorities and purposes
- Hand-written 'Thank You' notes
- Asking for referrals
- Post-op care calls
- Scheduling or treatment plan follow-up calls
- Reactivation efforts using prep form and activity log
- Before and after photos and request for testimonials

Patient Facilitation Monitor Topics _____

- New patient diagnostic monitor
- Clarified patient goals and priorities
- Understand patient concerns and barriers
- Bridging cognitive dissonance
- Managing dental fear issues
- Signed financial agreement
- Refer to specialist – OS, Endo, Ortho, Perio, Pedo
- Established stabilization phase
- Comprehensive treatment plan
- Facilitator self-assessment
- Debriefed NP visit with team
- Follow-up calls
- Hand-written 'Thank You' notes
- Asking for referrals
- Giving referral appreciation cards

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Daily Clinician Relationship Monitor

Name: _____ Day: _____ Date: _____

Patient Name	Clinical Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prod Today	Rest Tx Dx Prev	Rest Tx Dx Today	Rest Tx Sched	Admin. Notes
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Daily Clinician Relationship Monitor

(Sample)

Name: Ann Day: Tues. Date: Tues.

Patient Name	Clinical Notes	Pt Goals	Status Exam	Bite Eval	Digital Photos	I/O Camera	Visalite	Ref Ackn Cards	Systemic Health	Prod Today	Rest Tx Dx Prev	Rest Tx Dx Today	Rest Tx Sched	Admin. Notes
Tom Bradshaw	3 Mos overdue Perfs Stable	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$157	\$3350	\$0	\$3350	Follow-up OS Appt. Heating Cap
Sue Avendate	Recare	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$179	\$0	\$1,350	\$1,350	Will sched. Nx. Mo.
Bill Saffold	PM Rec 1-3 LR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$237	\$237	\$0	\$237	RPL-Get Perfs Chert NY.
Jennifer Young	Recare 1yr OD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$157	\$19,500	\$0	\$0	hot going on Sched of PERFS
David Takate	PM Stable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$295	\$0	\$0	\$0	
Michael Reese	Recare	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$179	\$1,350	\$0	\$0	Sched CEASAP
Serena Powell	Ch Px.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$137	\$0	\$0	\$0	Gave Cards
Chris Powell	Ch Px.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$137	\$0	\$0	\$0	40 Mom
Steven Ott	Imp for Bleach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$300	\$0	\$300	\$0	done
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Total										\$1,744	\$17,337	\$1,350	\$4,837	



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