

A man with dark hair and a light beard is wearing a black headset with a microphone. He is smiling and looking at a silver laptop. He is wearing a light blue button-down shirt over a white t-shirt. The background is a bright, out-of-focus indoor setting.

# 5 Specific Tasks

**To Set The  
Right Perspective  
As You Work  
From Home**

Here's a framework you can use to make sure you're using this opportunity to effectively work from home as a Dental Practice.

**the Thriving Dentist**  
with Gary Takacs

## Task #1

### \* Relationship-Driven Outreach

This is the time to reach out to our patients and simply do a check-in “contact”. Use the preferred medium of your patients to reach them.

Here’s an example script from LifeSmiles to inspire you;

*Hi! This is Carly calling from LifeSmiles, your dental office. I know these are crazy times for all of us. I just wanted to check in with you and see how you are doing. How's everything going for you?*

Use this opportunity to reassure patients. Although you wouldn’t be able to do it for everybody, do it for some & do it every day so you will at least turn some of your patients into ambassadors of your practice.

This gesture goes a long way for them as you've connected with them at a time when they needed it most.

## Task #2

### \* Follow Up On Insurance Claims

One of the best ways to keep cash flowing right now is to have a team member follow-up on any insurance claims that is more than 30 days past due.

A good benchmark to follow on this would be to have no more than 20 claims aged 30 days or more per full-time doctor in the practice.

By having someone to work on that every day as part of their workload, it will turn out to have a very high return on investment because now, the cash is going to come in instead of hanging out there unclaimed.

## Task #3

### \* Follow Up On Unscheduled Treatment Plans

This would be something that you can work on when you have an idea of when you are going to reopen.

By reviewing unscheduled treatment plans in advance, you reiterate the importance of following up on the recommendations, especially if it has been quite a while since they were recommended those plans, as it can cause a lot more pain if they were to postpone them any longer.

Not only are you being considerate of them but also acknowledging how important your patient's happiness & comfort is to you as a practice as well, while also giving you the opportunity to plug in & plan your schedule as you are about to reopen.

## **Task #4**

### **\* Review Past New Patient Calls**

This is a good time to be able to review your call tracking & call recordings and actually use recorded calls as a coaching medium in your practice so that you can coach your team members on conversions.

A conversion, in simple terms, is a new patient that called your practice & you converted them into an appointment.

If you are not recording your calls, you will have no idea what's happening, what's working & what's not working.

As mentioned earlier, you can use this as a coaching opportunity to coach & train your team members on effective call handling.

A great way to create a safe coaching environment to do just that would be to pick twice as many calls they did well on than they needed improvement on. For example, you can pick 4 good calls & coach them on 2 calls where they can learn from & do better. This way they are more excited to look forward to meetings like these than otherwise.

## Task #5

### ✱ Effectively Schedule For The First Two Weeks As You Reopen

As you reopen your practice, there's a high chance of your practice being overrun with lots of appointments. If you are not careful, you could get caught up in scheduling appointments that do not end up being productive, especially in a time where that is very crucial.

Assign a team member to ensure you only schedule effectively to be productive in the concept of Rocks, Sand & Water. This won't happen by accident so make sure you have the right person taking care of that in your practice for the first couple of weeks & more to come if you aren't doing this in your practice already.

We discuss this topic and action steps in greater detail in episode #429 of The Thriving Dentist show. Listen to the full podcast for more in-depth information at <https://www.thrivingdentist.com/podcast-show/>