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## **What to Expect on Your First Consulting Session**

The first consulting session lasts 4-5 days depending on the size of the practice. A complete agenda will be created to fit the appropriate length of time needed.

### **Average Four-Day Visit Overview:**

#### Day 1

1. I arrive at your practice at 9:00 AM and leave at 4:00 PM
2. The first day consists of meeting with the doctor(s) for one hour, to review consulting agreement and practice data, followed by meetings with each team member for 30–45 minutes. Individual team member meetings are completely confidential.
3. I like to have lunch with the Doctor(s) on my first and second day. I try not to pull you away from production and use this time to keep the doctor(s) up to date and discuss direction.
4. Once the meetings are complete, I may gather additional information from your database to ensure we have an accurate assessment of your current standings.
5. If time permits, I also observe all team members as they work.
6. Once I leave your practice, I work from my hotel room or home office on your Practice Analysis Report. The Action Plan Report takes about 6-7 hours to write.

## Day 2

1. I arrive at your practice at 9 AM and leave at 4:00 PM.
2. Day two consists of the beginning of implementation. All practices are different, and each is designed with a customized approach.

## Day 3

1. I arrive at your practice at 10:00 AM and leave at 4:00 PM.
2. The Practice Analysis Report is presented with explanation. The Practice Analysis Report documents the current status of your practice with recommendations for the future.
  - a. The afternoon consists of the first, three-hour team meeting. The team meeting consists of explaining the consulting process to your team, informing your team of the current status, and explaining the direction we plan to take. The Chairside trackers are introduced with instructions.
2. I will continue to finish the Action Plan Report this evening to present to you and your team at the next day's scheduled team meeting.

## Day 4

1. I arrive at your practice at 10:00 AM and leave at 3:00 PM.
2. Implementation continues; I will work with your team members on an individual basis during the morning. I will train the team according to the systems that we mutually agreed upon. The Doctor is free to work on his patients concurrent with team member training. A sample of implementation could be one or more of the following:
  - a. Verbal skills
  - b. Creation of any needed in office forms
  - c. Chairside Tracker to measure patient's leaving complete, open time, retention, production and hourly production
  - d. Custom Master Yearly Tracker (complete overview of all critical practice stats and comparisons to previous year stats)
  - e. Morning Huddles implementation
  - f. Computer accuracy and data entry training
  - g. Case Management strategies
  - h. Continuing Care strategies
  - i. Accounts Receivable (including billing) strategies
  - j. New Patient Experience
  - k. Scheduling Strategies, etc.
  - l. Fee Analysis

- m. Office Manual
  - n. Job Descriptions
  - o. Custom team evaluations
  - p. Overhead Analysis and planning
  - q. Marketing (internal and external)
  - r. Training for effective team meetings
3. The final lunch with the doctor(s) and team members is designed to finalize all agreements of implementation. The second team meeting is 3 hours in the afternoon. During the team meeting, we finalize commitments and ensure that everyone is on the same page and knows what their responsibilities are.
  4. I will schedule a debriefing with the doctor at 2:45 PM and leave at 3 PM.

It is important to understand that consulting is best when approached in layers. I find that doing too much at once frustrates and discourages the team. Each visit, I will add an additional layer to each strategy and or will introduce new practice management systems. The Doctor(s) and Office Manager are advised of each step in the journey.

Consulting is not an overnight fix. Each consulting session is 3–5 days depending on the size of the practice. Definitive Dental Solutions recommends that during the first 12 months, each consulting visit is scheduled about eight to twelve weeks apart to guarantee forward progress and success.

On all additional consulting visits, I will need a three- hour team meeting scheduled on my last day from 12:00 to 3:00