



## **Practice Check-Up: Are You “Person-Dependent?”**

### **Instructions:**

Answer each question honestly for your practice. Tally up your "Yes" answers, then share your reflections in your group. Let's find out how much your practice relies on *people* vs. *systems*!

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### **1. Sticky Notes Galore?**

When a key team member is out, do you leave them a mountain of sticky notes or post-its to deal with when they return?

☐ Yes ☐ No

### **2. The problem of: “Only Katlyn Knows That”?**

Are there various things only *one person* knows how to do with excellence... and everyone just waits for them to return?

☐ Yes ☐ No

### **3. No Lunch for You?**

Do people regularly have to skip lunch or stay late just to “catch up” on what didn’t get done when a specific team member, with a special knowledge set, couldn’t come to work?

☐ Yes ☐ No

### **4. Treasure Hunts?**

Does finding the lab case, patient’s insurance info, what post-op instructions were given, or the financial arrangements you discussed, sometimes feel like a scavenger hunt?

☐ Yes ☐ No

### **5. Dread of the Unexpected?**

When you hear someone is out for the day (week), does your stomach drop because you know exactly which chaos is coming?

☐ Yes ☐ No

### **6. New Hire Maze?**

Do new team members learn mostly by following others around for instruction, thereby measurably slowing that person down, or without that, they guess their way through the day?

☐ Yes ☐ No

### **7. Patient Questions.**

When a patient calls with a question (clinical or frontdesk), is it common to have only one specific person with that knowledge? (And you spend the day constantly circling back to specific team members for their recollections about particular situations.)

☐ Yes ☐ No

### 8. Scheduling Chaos?

Is it tough to make the day productive when your “usual scheduler” is out—even though others are sitting at the front desk?

☐ Yes ☐ No

**9. The “I Thought You Did It!” Moment? (or worse yet... you hear “it’s not my job” when an important task has been forgotten.** Do team members regularly assume someone else completed a task, only to find it was missed or ignored?

☐ Yes ☐ No

### 10. Backflow in Sterilization?

If your sterilization lead is out - or clinical team is short-handed - does the sterilization flow get messy, inefficient, or stressful?

☐ Yes ☐ No

### 11. Hanging On to a “Bad Fit”?

Do you get the feeling that your doctor/team leader is hanging on to an employee who is not a good fit for the team... simply because they are afraid of being “short-handed?”

### 12. “Dropping the baton” with hand-offs

Does every appointment note (and patient call documentation) contain all that is needed by the *NEXT* person who works with that patient, so that team members are not chasing each other down for details and clarity?

- - What exactly did the patient say was their “chief complaint” or concern?
  - What exactly did the dentist find was the problem?
  - What exactly was recommended, and what pros and cons were given to the patient?
  - What all was done today.
- - What financial details were discussed?
  - And what exactly needs to be done next?

☐ Yes ☐ No

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### ★ Results: (total Yes's) \_\_\_\_\_

- **8–12 Yes's:** 🚨 *Red Alert!* Your practice is running on people's backs, not systems. You're surviving, but not sustainably. You're in the right place today!
- **4–7 Yes's:** ⚠️ *Caution!* Some systems are working—but there are clear gaps. Good news: you've got lots of easy wins ahead.
- **0–3 Yes's:** 🎉 *Rock Stars!* Your practice is on the systems track. Let's talk about how to keep that momentum going and elevate the whole team.