5-Step Goal Setting Worksheet for Dental Team Incentive Plans

SMILE POTENTIAL
DENTAL PRACTICE COACHING

Step 1: Track Your Current Trends & Define Your Practice Goals

- Run three months of daily net production per provider (doctors and hygienists).
- Divide by the patient care hours of each provider.
- Result = Hourly Net Production per Provider.

Set measurable targets tied directly to performance and profitability. Add 12-15% as a starting point and increase as the target becomes easier to achieve.

Hourly Net Production Goal per Provider (Drs & RDHs): _____________

Daily Collections Goal: _____________

Monthly Practice Goal: ____________

(*Tip: Align daily goals with monthly targets so the team sees how each day impacts the bigger picture.*)

Step 2: Translate Goals Into Daily & Monthly Targets

Decide how success will be tracked and communicated.

- Daily Production Goal (total practice): _____________
- Daily Collections Goal (must match production): _____________
- Monthly Production/Collections Goal: _____________

☐ Daily goals will be reviewed in morning huddles.

☐ Progress will be tracked visibly (whiteboard, dashboard, or report).

Step 3: Add Conditions That Support Growth

To ensure balanced performance, include conditions such as:

- Patient Retention Rate: _____________
- New Patient Goal per Month: _____________
- Other Conditions (case acceptance, scheduling efficiency, reviews, etc.): _____________

(*Tip: Conditions prevent the team from focusing only on numbers and ensure quality care drives rewards.*)

Step 4: Create the Reward Structure

Decide how incentives will be earned and distributed (consult with your accountant).

Incentive Payout Frequency:

☐ Daily mini-rewards

☐ Monthly payout (based on total results)

Payout Method:

☐ Payroll bonus (equal for all team members)

☐ Gift card or team experience

☐ Combination

All team members share the reward equally. No hierarchy, no elitist mentality, everyone wins together. Can be prorated for part-time employees.

Step 5: Launch, Measure, Refine

- Start Date of Incentive Plan: _______________
- Who Will Share Results Daily: _______________
- Monthly Review Date: _______________
- Adjustment Plan (if goals are missed or exceeded): _______________

(Tip: Consistency is key. Reward what you measure, and refine as needed to keep the system fair, motivating, and profitable.)