



30-Day Team Engagement Checklist for New Dental Practice Owners

Purpose: To help new dental practice owners or DSO leaders build trust, improve morale, and lead their inherited team with confidence and clarity during the critical first month.

Week 1: Listen & Learn

Objective: Build rapport and assess current culture

Week 2: Communicate Vision

Objective: Set tone and reduce uncertainty

Week 3: Engage & Empower

Objective: Build momentum through action and feedback

Week 4: Align & Advance

Objective: Move from observation to direction

BONUS TOOLS:

The DSO Team Transition — Where Leadership Meets Loyalty

BONUS TOOLS:

Sample 1:1 Questions for New Owners

Use these during your individual meetings to build trust and gather insights:

- What do you love most about working here?
- What's something you'd like to see improved?

- How do you prefer to receive feedback?
- What's one thing I should know about this team?
- Is there anything you feel uncertain about right now?

Staff Pulse Survey Template

Anonymous survey to measure morale and identify early issues:

- I feel informed about what's happening in the practice. (1–5 scale)
- I trust the leadership in this office. (1–5 scale)
- I feel valued and appreciated. (1–5 scale)
- I understand what's expected of me. (1–5 scale)
- I have the resources I need to do my job well. (1–5 scale)
- One thing that would improve our team dynamic is: _____

Tip: Use Google Forms or paper drop box for easy collection.

Communication Script: "How to Address Legacy Concerns with Empathy"

Use this script when addressing outdated or problematic systems respectfully:

“First, I want to acknowledge that this system may have worked well for a long time. I’m here to understand what’s been successful and what might need a fresh look. I’m not here to change things just for the sake of change—I want to collaborate on what will serve both our patients and our team best moving forward.”

Pro Tip: Consistency + Empathy = Confidence. The more you show up, listen, and follow through, the faster trust will grow.