



Increasing Production and Case Acceptance

Helping your patients choose what's best for them

Sponsored by **DENTRIX**



About the Author

Debra Engelhardt-Nash is a practice management consultant with 30 years in dentistry. She recently received the 2015 Gordy Award for Outstanding Lecturer, and in 2014 was named one of the Top 25 Women in Dentistry. She is a founding member of the Academy of Dental Management Consultants and has served two terms as the organization's president. She is a member of the American Dental Assistants Association and serves on the American Dental Association Practice Management Advisory Board. To contact Debra for a personal consultation, email her at Debra@debraengelhardtnash.com or visit www.DebraEngelhardtNash.com.

Table of Contents

Influencing Case Acceptance

Apply the 80/20 Rule4

Communicating Trust

Involve Your Team5

Presenting Your Case

Offer the Ideal Solution6

 Take Your Time6

 Start with the Best6

 Watch Your Body Language.....7

 Speak from the Heart.....7

 Bring Backup.....7

Talking About Money

Be Fearless.....8

 Be Proud8

 Establish Value.....8

Monitoring Results

Leverage Your Dental Software9

 Get Professional Help9

 Rely on the Industry Leader9

Influencing Case Acceptance

Apply the 80/20 Rule

Since the economic downturn of 2008, the old ways of running a dental practice have changed. There are fewer solo dentists and more HMOs. You compete with corporate dental offices that offer extended hours and multiple specialties under one roof.

Keeping your productivity at its peak is more important than ever, and case acceptance is vital to production. Though you may be highly skilled in dentistry, if you don't know how to get your patients to accept your treatment plan, you won't get to use your hard-earned clinical skills. Did you know:

80 percent of the reason your patients choose your care has nothing to do with dentistry?

This eBook is about that crucial 80 percent, the factors that get patients to say yes to treatment plans. Factors such as your facility, location and reputation make up the other 20 percent.

The main reason patients choose a dental office—and your recommended treatments—is the relationship.

The relationships patients have with you and your team form their decisions about your practice.

The best way to build strong relationships with your patients is great customer service. Every team member can influence case acceptance by the way they treat your patients.

The key to great customer service in your dental office is to remember you're talking to a person, not a patient with clinical needs. Get to know the person first, and you'll do a better job communicating with them.

Building a good relationship with each patient drives up your case acceptance, production and income. And in the process, you distinguish your practice from the competition. You become "the dentist who listens" or "the practice that really cares" in your community. (You also get more referrals!) You only need a 1 percent edge.

The "Yes" Formula

What does it take to get a yes from your patients? Try this formula:

- ✓ **Avoid negative self-talk.** ("My fees must be too high," "The politicians are ruining my practice," "If only I had the right team.")
- ✓ **Focus on the positive.** Believe you offer your patients the best care and that your office offers the best treatment options.
- ✓ **Commit to your vision.** Get your team on board with your intention and your practice vision.
- ✓ **Learn the art of case presentation.** Attend live seminars. Record yourself doing a treatment presentation and review it. Ask team members to evaluate your strengths and weaknesses.
- ✓ **Train your team.** They should understand your treatment plans and the materials, processes and technology involved so they can answer patient questions confidently.
- ✓ **Set the scene.** Present treatment in a quiet, professional, uncluttered and uninterrupted environment.

Communicating Trust

Involve Your Team

Do you really have time to build a good relationship with each patient in your practice?

It takes 15 seconds or less to establish credibility with a patient.

With your whole team involved and committed to great customer service, it doesn't take long to establish trust. In fact, your patients should trust you within moments of connecting with your practice. You communicate trust with your:

- Website and social media
- Phone manners
- Reception area
- Office atmosphere
- Team attitude
- Practice protocols

All of these factors continue to validate your patients' decision to come to you for dental care. A friendly team and a stress-free, professional atmosphere both help to communicate the value of your care and increase your patients' trust.

Typically, the last person patients meet is the doctor. So it's up to the team to initially establish trust. Make sure each team member knows your practice's philosophy of care and can share your vision with patients.

Train your team to validate your fees (more about that later) and advocate for your treatment plans. Whatever their roles, their job is to demonstrate to patients that what you have to offer is worthy of your fees. Doctor and team need to show that they're proud of what they do.

Create the right environment for trust. Make your practice image in the office, on the phone and over the Internet congruent with the quality of care you provide. Your image should say, "Beautiful dentistry is provided here."

The Elevator Pitch

Imagine you're on an elevator and someone asks what you do. You have about 15 seconds to demonstrate your difference. When introducing yourself, use this opportunity to communicate your vision, value and philosophy of care.

Answer as if the question is, "What is unique about your practice?"

Here are some examples:

- "I'm a dentist who focuses on cosmetic dentistry. I love helping people have the smile they've always wanted – and seeing how improving their dental appearance improves their self-esteem."
- "I'm a dental hygienist who helps create beautiful, healthy smiles. Our patients love our friendly atmosphere and the long-lasting results of their care."
- "I am a patient coordinator at one of the best dental offices in town. I help patients get the type of treatment they want. We want all of our patients to enjoy their experience so they'll tell their friends."
- The best elevator pitches are conversation starters that invite follow-up questions.

The best elevator pitches are conversation starters that invite follow-up questions.

Source: <http://thecuriousdentist.com/3-tips-for-a-killer-elevator-pitch>

Presenting Your Case

Offer the Ideal Solution

It's one thing to know how to provide the needed treatment clinically. It's another thing to know how to present the treatment so patients understand and accept it.

The more confident patients are that they've chosen the right office for their dental care, the more readily they'll accept your recommended treatment. That's the payoff for building good relationships and communicating trust.

Once you've earned their trust, give your patients the information they need to help them make the best choices for their care. Remember, you're offering good news—a solution to your patients' problems.

Take Your Time

When you present a comprehensive treatment plan, you're asking your patients to make a significant investment in their dental or aesthetic care. Don't tell yourself you're going to do it in five minutes. Make your patients feel as if you have all the time in the world, nowhere else to be and nothing more important than them at that moment.

It takes time, focus and attention to present your case. Prevent noise and interruptions by presenting in a consultation room, not in an operatory. Assure your patients, "I'm going to give you all the time you need to help you make the decision you want."

Start with the Best

Present your ideal treatment plan first. You can always scale back and present other options later.

If you never tell your patients what's possible, it's guaranteed they'll never choose it.

Always ask your patients' permission to present treatment. This lets them know it's going to be a two-way discussion. Try something like: "Would you allow me to tell you what I could do for you if you were my sister/mother/daughter?"

Presentation Tips

According to the ADA, the average case acceptance rate is 70 percent. A good presentation can help raise it to 80 percent or more. Follow these tips for greater success:

- ✓ Never delegate the treatment presentation. Your patients want to look into the eyes of the person who's doing the work.
- ✓ Use patient speak, not doctor speak. Avoid dental terminology.
- ✓ Look at patients' faces, not at your computer screen or paper.
- ✓ Use visual aids.
- ✓ Present the ideal option, then learn to be quiet and listen.
- ✓ Let them know the urgency of this treatment.
- ✓ When a patient asks you "how much?" it means they're ready to go. Stop showing slides and tell them how much.
- ✓ Before releasing patients to discuss payment options with your financial coordinator, let them express their concerns and expectations to you.

Presenting Your Case

Offer the Ideal Solution (*continued*)

Watch Your Body Language

When presenting a treatment plan, your body language should convey concern, not ambivalence. Stay at eye level with your patients, directly across and facing them.

If you're in the operatory, your patients should be sitting upright. Sit close enough for them to clearly hear you (18 to 24 inches from your knee to their hand). Look at them when you speak, not at your computer screen or printout.

Make your tone of voice intentional, focused, caring. Remember, 55 percent of communication is body language. 38 percent is voice tone and 7 percent is the words you use.

Speak from the Heart

Patients will hear your intentions more than they hear your words, so speak from the heart. Every situation is different. Listen and respond instead of using a script.

Use life experiences that patients can relate to. If a patient says, "That's a lot of money!" you might respond with:

It is, isn't it? That's why we're committed to using the best materials and techniques. I remember the first time I picked the lowest bid for landscaping. The next time, I picked the company that could do it right.

Be prepared with answers about financing and about handling any dental phobias or other barriers to treatment.

Bring Backup

The third person in your presentation room (treatment coordinator, hygienist or dental assistant) should be standing on the same side or behind the doctor. They are the silent second opinion for your treatment plan. Their presence helps patients feel more comfortable in their decisions.

After the doctor leaves, the third person becomes your patients' advocate and the practice representative. They can confidently say, "Absolutely!" when patients ask, "Is this worth it?"

What to Avoid

Simple mistakes can kill your treatment presentations. Avoid these seven deadly slip-ups:

1. Rushing through the presentation.
2. Assuming patients will be afraid of a procedure or will have an issue paying your fees.
3. Quoting practice policies.
4. Making insurance the good guy or the bad guy.
5. Talking too much and listening too little.
6. Including unnecessary details.
7. Releasing patients too soon for the financial conversation.

Number 7 is the most deadly mistake, because the decision to accept treatment must happen with the clinical team—not with the financial coordinator.

The financial coordinator does not sell your case. He or she only negotiates the terms of the financial agreement.

Make sure you have a patient's acceptance before you release them. One of the best ways is to ask, "What other questions may I answer for you?"

Talking About Money

Be Fearless

For you and your team to talk fearlessly about money with your patients, you must first create financial protocols that are friendly to patients and fiscally sound for the practice.

Your fees must be consistent, reasonable and responsible, based on your practice's financial strategy.

- Are you high-volume/low-fee, or high-fee/low-volume?
- Which strategy is best for your practice, considering your location and your community?

Be Proud

Once you've created financial protocols, don't be afraid of your fees. Avoid apologizing for your fees or treatment plans. Say, "I've got good news. We have a solution to your problem!" instead of, "I'm sorry, but you need a crown."

You and your team should be proud. Your fees are worthy of the time, materials and clinical skill you invest in creating solutions for your patients.

Establish Value

It's your responsibility to establish the value of your clinical services. Although your fees give some indication of value, your patients won't know how skillful you are unless someone tells them. That's where your team needs to step up and say, "The doctor is an amazing clinician." They help justify your fees and validate your case presentations.

If patients hesitate to accept your plan, ask, "What is preventing you from proceeding with care? Tell me what you had in mind." If they can't afford it, and you've explored care financing through outside resources, be certain to thank your patients for trusting you and for their candor. You may also want to mention that the treatment will never cost them less in the future – probably more. Let patients know you will follow up soon with a phone call to answer any questions that arose after they left their appointment.

About Insurance

Dental insurance has only become popular in the last 30 years. The maximum allowance of \$1,000 hasn't changed in that time. Today, \$1,000 may cover two hygiene visits and a filling. Most patients have no idea what their insurance actually covers.

If your practice is going to accept dental insurance, consider the following:

- ✓ Which insurance plans are offered by the majority of employers in your community?
- ✓ Do your patients know that insurance is an allowance provided by their employer, and that it's not designed to cover 100 percent of their dental care?
- ✓ Help patients understand that you don't compromise dental care standards based on the limitations or exclusions of their insurance plans.
- ✓ There are thousands of plans, fee schedules and exclusions. You offer your patients **one standard of care without compromise.**

Monitoring Results

Leverage Your Dental Software

Dental software such as Dentrrix can help your practice:

- Provide visual aids for case presentations
- Prepare and track treatment plans
- Verify your patient's insurance coverage
- Figure and track your case acceptance rate
- Monitor treatment effectiveness

One of the most important things to monitor is what you're doing with your new patients, not just the number of new patients. For example, say you had 30 new patients this month; you presented \$200,000 of dentistry treatment to new patients and \$100,000 was accepted. That's a 50 percent acceptance rate. Is that a number you can live with? Can you grow your practice at that rate?

Your practice management software can also help you strengthen relationships with your patients. When a patient calls, go to More Information, available from most toolbars, and Select Patient to find out more about who you're talking to. Make them feel that they're important and they matter to you.

Get Professional Help

To quickly improve your case acceptance rate, you may need professional help from an experienced dental consultant like Debra Engelhardt-Nash. She can help your practice get results. For more information, visit www.debraengelhardtnash.com.

Rely on the Industry Leader

Dentrrix provides software solutions that increase the productivity and profitability of your practice. That's why more than 35,000 dental practices rely on Dentrrix today.

In addition to full-featured clinical tools, Dentrrix includes financial analytics, accounting and billing tools, innovative eServices, training seminars, profitability coaching and more.

Dentrrix Tools

Dentrrix practice management software can help you increase production and case acceptance with these tools:

- ✓ **Dentrrix Treatment Planner** to create and manage patient treatment plans.
- ✓ **Dentrrix Treatment Plan Presenter** to explain the need for and benefits of the recommended treatment.
- ✓ **Dentrrix Insurance Manager** to verify insurance eligibility in real time or before appointments.
- ✓ **Dentrrix Ledger** to automatically estimate the insurance portion and create statements on demand.
- ✓ **Practice Advisor Report** to analyze your production, case acceptance, collections, schedule management and more.
- ✓ **Unscheduled Treatment Plans Report** to contact patients who need treatment.
- ✓ **Treatment Plans with Benefits Available Report** to encourage patients to accept their treatment plan.
- ✓ **Dentrrix Treatment Manager** to review patients who have unscheduled treatment plans or benefits remaining, etc.
- ✓ **Treatment Plan Statistics Analysis Report** to compare treatment planning and production by provider.

Visit www.dentrrix.com for details.

