



ORTHO2

The Systems Essential to Case Acceptance

by **Dr. Roger P. Levin**

The contrast between the orthodontics market just a decade ago and what you and your colleagues face today sends a sobering message: the rules have changed, dramatically and permanently.

The law of supply and demand does not favor orthodontists these days. The supply of those offering ortho treatment—your competition, which now includes not only solo ortho practices but also GPs, pediatric dentists, and dental service organizations (DSOs)—has increased substantially. At the same time, the demand for dental services on the part of patients has decreased, largely due to the increased financial stress caused by the Great Recession and limited recovery. In short, new patients are much more difficult to find and start than before.

Given this formidable market challenge, your success depends on your ability to take a more businesslike approach to increasing production. To do so, you need to implement changes in five of the nine essential ortho practice management systems: treatment coordinator, scripting, patient marketing, referral marketing, and new patient experience.

Treatment Coordinator – Key to Improved Case Acceptance

When Levin Group first started introducing this staff position in our clients' ortho practices, any initial skepticism quickly disappeared when both case acceptance rates and doctor productivity climbed to new levels. This occurs because (a) the treatment coordinator (TC) is more effective than the doctor at selling treatment, and (b) having delegated most of the responsibility for presenting treatment to the TC, the doctor has much more time to devote to actual production.

Just as you're highly trained in orthodontics, your TC must be highly trained in converting prospects into patients. Your investment in TC training will be repaid many times

over. You can expect a skilled TC to post a 90% case acceptance rate. You'll also begin seeing an increase in the number of starts and referrals based on the relationships your TC builds with current patients and parents.

A TC's responsibilities typically include:

- **Conducting the Majority of Each Case Presentation**
 - If a new patient consult takes an hour, 50 minutes of it will be handled solely by your TC. During that time, she relies on her training and scripting to...
 - Quickly establish a personal connection
 - Build value by praising you and the office team
 - Explain the recommended treatment in terms of benefits
 - Briefly describe payment options
 - Answer questions (including those not asked) and address objections
 - Introduce you to the conversation
 - Close the presentation, asking for acceptance
 - Initiate arrangements for payment
 - Schedule patients when the answer is "Yes" or plan for follow-up with those who aren't sure
- **Planning and Supervising the New Patient Experience** – If first impressions of your practice are anything less than great, you'll never even get a chance to present. Working closely with your front desk team, the TC will develop scripts for the first call and the first visit. These will work together, leading adult patients or parents to the consult room in the right frame of mind.
 - **Coordinate Payment Arrangements with Your Financial Manager** – Cost of treatment is the single biggest barrier to case acceptance these days, so your

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TC needs to make this part of the process seamless and reassuring.

- **Influence Marketing Activities** – Your marketing coordinator (MC) should have primary authority for developing and implementing both patient and referral marketing strategies. However, your TC can provide invaluable input information, based on her direct experience with patients and parents before, during and after consults. Her insights will enable your MC to do a better job.
- **Manage Your Practice's Observation Program** – Perhaps the most reliable source of new patients for any ortho practice is its observation program. Your TC can recruit siblings of current patients, strengthen relationships with their parents, and then transition those who need orthodontics from observation to treatment.



Scripting – For Results-Driven Practice-Patient Communication

Your purpose is to provide orthodontic care, but your success depends, to what may be a surprising extent, on verbal interactions between your practice and prospective adult patients and parents. No amount of clinical expertise will make up for poor front desk skills. Nor will your excellent credentials compensate for a lackluster presentation. You and your staff need to learn how to say the things that will get the desired results.

With the right scripts and sufficient training in how to use them, all members of your team can become much more effective communicators. By creating smart step-by-step systems and then translating those steps into scripting, you can predetermine what should be said in each situation. Then, role-playing sessions will familiarize staff members with their scripts—not merely the words but the purpose. Once they learn each script's intent and begin role-playing, they'll become comfortable using their own words, for greater effectiveness.

Everyone who has contact with patients will need scripts and training, including you. For the best results, develop a

comprehensive plan and schedule a combination of special sessions and role-playing at monthly staff meetings.

Patient Marketing – Word-of-Mouth vs. Ortho Shopping

When adults or parents decide that ortho treatment may be needed, what will they do? Most likely go online, looking for listings, reviews and practice websites. They'll probably also seek the advice of people they know and trust. The recommendations of family members or friends will probably carry more weight than ratings by strangers. This is why what marketers refer to as word-of-mouth advertising has such great value.

If your practice is a pleasant, comfortable environment and you provide WOW customer service to visitors, some patients or parents will undoubtedly refer others to you. However, you can't expect the growth of your practice to be high on their list of priorities. Levin Group's experience with clients shows that you can increase the number of patient-parent referrals substantially with little effort or expense. You can generate referrals from 40-60% of current parents and adult patients by simply asking. A tasteful sign in the reception area, casual comments at checkout, or sincere thank-yous will work wonders, encouraging strong recommendations of your practice to friends and family, coworkers, neighbors, and others. Your MC should have 15 patient referral strategies ongoing at any given time, monitoring results so underperforming approaches can be swapped out for more effective ones.

Years ago, word-of-mouth referrals may have led directly to phone calls to your practice. Today, a visit to your website will probably come next. If you don't have a website or have one that's hard to find, unattractive, outdated or fails to make a distinct, positive impression, many prospective patients will end up at other practices.

Referral Marketing – Developing a Network of Support

Patients and parents may not be able to judge the finer points of your clinical skills, but other doctors can. By acquainting them with your credentials, sponsoring educational events, communicating well about mutual patients, and helping strengthen their practice-patient relationships, you'll give them many reasons to send their patients to you for ortho treatment. You'll need to make yourself available for doctor-doctor lunches to keep the referral relationship strong.

Referring offices' staff can also influence their doctors and patients to rely on your practice. With appropriate learning opportunities, food deliveries, fun events, and other strategies, your MC can make these team members your allies.

Some referral marketing activities require significant

expenditures, so your MC should classify referrers (and potential referrers) so that the most productive relationships get the support they deserve.

The New Patient Experience – The Moment of Truth

Referrals are the prerequisite, but if patients' and parents' initial experience with your practice falls short of their expectations, case acceptance will fall short of your expectations. Exactly how you and your staff handle the first call and first visit – not to mention the case presentation itself – will have a strong bearing on whether you win acceptance.

Ortho treatment involves many appointments over a number of months, so how your office “feels” to prospects, and how well they can relate to your staff, can have a pronounced effect on your acceptance rate.

When a new patient call is received, your front desk coordinator should launch into a carefully scripted conversation that builds value for your practice, projects energy and excitement, gathers personal information useful for relationship building, and schedules a consult.

The first visit must be equally well-planned. Alerted about who will present that day, all staff members will be ready to extend a warm and impressive welcome to parents and patients. As with the phone call, your objective is to make prospective patients and parents believe that your practice is special and would be a pleasant—perhaps even fun—place to visit and receive ortho treatment.

A well-scripted case presentation, the main event during the first visit, should seem like a natural extension of the positive experience parents and patients have had up to that point. At its conclusion, you should either have a new patient on the schedule (within seven days, while enthusiasm remains high) or at least an opportunity to follow up, answering any questions, presenting to a spouse, etc. Your follow-up process should end only if you get a definite “No.” At that point, it's time to ascertain why the parent or adult patient declined and move on to the next prospects.

Increasing case acceptance in today's more competitive market depends on your ability to upgrade essential systems and implement thorough staff training, including scripting. With marketing that generates a steady flow of referrals and an outstanding experience for patients and parents who contact your office, you should be able to consistently reach a 90% case acceptance target. ♡

About the Author



To learn more about how to market your ortho practice, attend Dr. Roger P. Levin's “The Business of Orthodontics... Simplified” seminar. Ask your Ortho2 Regional Manager how you can receive an educational grant to attend tuition-free.