

OBSERVATION RECALL PATIENTS ARE YOUR FILE OF GOLD!

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NEW PATIENT COORDINATOR WORKSHOP
APRIL 24 – 25, 2015 IN CHARLOTTE, NC
SEPTEMBER 24, 2015 IN LAS VEGAS, NV
ALONG WITH ORTHO VOICE

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PROGRESSIVE CONCEPTS

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Sample Child Questionnaire

Meet Dr. Smith

- She/he likes for his patients to call her/him Doc
- She/he has 3 children
Her/his favorite food is pasta
- She/he likes to read mystery books
- She/he once played baseball in College
- She/he has a bulldog named Sam



Now, Tell Him About YOU

My name is: _____ But you can call me: _____

My school is: _____ I really like: _____

Favorite things to do: _____



Favorite sports: _____ Favorite foods: _____



Favorite music: _____ Favorite book: _____

Favorite TV show/movie: _____



Best friend: _____ Favorite pet: _____

I am really good at: _____

The best thing that ever happened to me was: _____


I really love to: _____




My friend _____ also comes here for braces.



How would you best describe your personality?

Bright Sunny Yellow 

IBM Blue 

Soft Seafoam Green 

Fire Engine Red 

Observation Recall Program

One of the things that make our office special is our careful attention to the individual needs of each parent and child, especially when making the important decision on when to begin braces. You can be sure that Dr. Stull will always answer this question with your child's health in mind, just as she would for her own children.

Dr. Stull has placed _____ in our Complimentary Observation Recall Program.

Benefits of our Observation Recall Program

- Dr. Stull will follow your child's dental growth and development until orthodontic treatment is recommended.
- The observation visit interval is typically every 6-12 months and are *complimentary*.
- Dr. Stull will evaluate the eruption of permanent teeth with periodic panoramic x-rays. These periodic x-rays are complimentary.
- It is important to keep these visits, even if it doesn't appear that there have been any dental changes or that any baby teeth have been lost since the last visit. This may be an indication of underlying problems that need to be addressed.
- In addition to monitoring the development of permanent dentition, Dr. Stull will also want to ensure that your child's bite is developing correctly. Bite problems and jaw growth issues are related to growth patterns and must be addressed at the proper stage of development. This is not defined by age but by your child's individual need.
- During this observation recall period, Dr. Stull will determine the perfect timeline for initiating orthodontic treatment to achieve a beautiful healthy smile!

Observation Recall Statistics

Charlene's Example:

Your #'s

F) Number of patients in Observation Recall status	500	_____
G) Number of times you see observation recall patients per year (Every 6 months equals 2, every 8 months equals 1.5)	2	_____
H) Recall patients who have no appointment and no recall appointment	50	_____
I) Total number of recall checks seen last year	800	_____

(F) $500 \times (G) 2 = \text{Ideal Total } 1,000 \div 12 \text{ months } 83 = \text{Ideal per Month } 83$

(I) $800 \div 12 = 66 \text{ Actual per Month}$

$\text{Actual per Month } 66 \div \text{Ideal per Month } 83 = \text{Recall Effectiveness } 80\%$.

(F) _____ x (G) _____ = Ideal Total _____ \div 12 months _____ =
Ideal per Month _____.

(I) _____ \div 12 = _____ Actual per Month

$\text{Actual per Month } ______ \div \text{Ideal per Month } ______ = \text{Recall Effectiveness } ______ \%$

Putting a Patient into the Recall System

The New Patient Coordinator plays a big role in the effectiveness of your ongoing recall system for pre-treatment orthodontic patients. It is critical to set up an effective orthodontic pre-treatment program in your office.

I recommend the following:

- 1. Determine if the patient will be put on recall at the exam. (Diagnostic records may be necessary to make this decision.)**
- 2. The doctor should inform the parent of the advantages and benefits of coming in for regular checks every six to twelve months prior to the braces going on.**
- 3. The doctors should discuss any possible early treatment, and any fees for this will be determined at the time.**
- 4. The doctor should inform the patient/parent of any possibility of primary tooth removal by their family dentist or surgeon.**
- 5. Some offices charge a fee for pre-orthodontic observation visits. You can either charge them on a per-visit fee, or have a flat fee of approximately \$125, which will be deducted from their initial payment fee. Either way advise the patient and parent of your recall fee policy.**
- 6. Schedule the recall appointments with the New Patient Coordinator if possible.**
- 7. Schedule the recalls that you think will be ready to start the next time as a 45 minute – 60 minute “ready recall” with the New Patient Coordinator.**
- 8. Send a post-exam letter thanking the patient and parent for selecting your office and reinforcing the importance of the recall visit in the future.**
- 9. Track your recall statistics monthly.**
- 10. Have someone in charge of recall follow-up.**
- 11. Create a fun environment for the recall patient.**

Recall Patients are Your File of Gold!

- We keep in touch with our recalls through birthday emails and newsletters.
- We schedule their next appointment before they leave the office.
- We have a “Recall Coordinator”.
- We include them in our events.
- We make the appointment fun (no waiting on the doctor for his/her 3 minute check.

Contacting Recall Patients

How to Contact Recall Patients Who Have Slipped Through the Cracks

1. Run an open observation recall list. These are patients who have not been seen in one year or more and have missed their last observation recall appointment.
2. Pull charts to review unless all necessary information is in the computer.
3. Follow the course below that is appropriate.

A) Patients Who Have Received 3 or Less Reminders

Call the parent at work or call the home around 6pm to reschedule. The following scripting is suggested:

“Hi, this is _____ calling from Dr. _____’s office. How are you this evening? (Pause) Dr. _____ asked me to give you a call to set up an orthodontic appointment for _____. It’s been a year since Dr. _____ has seen _____ and h would like very much to see how he/she is progressing. Would next Wednesday at 4pm work for you? (Pause)

The number one goal is to schedule an appointment!

If the parent does not schedule and says, “I’ll call you back”, make a note on the chart and put the patient in the next month’s recall.

If the parent says, “no, we don’t want to make an appointment at this time”, say “That’s fine Mrs. _____. We will deactivate _____’s file at this time. If you decide you would like to come back to our office in the future just give us a call. We’d be happy to make him/her another appointment”. Deactivate the file. Keep a list or stack of deactivated charts for the month for the doctor to review.

Contacting Recall Patients

Some offices take this a step further by saying, “We always appreciate feedback from our patients. Would you mind telling me why you decided not to return to our office so that I can make a not in _____’s record?”

B) Patients Who Have Received More Than 3 Reminders

Send a letter with “address correction requested” on the envelope. The letter should read like this:

Dear Parent:

Dr. _____ is concerned that _____ has not been into our office for his/her pre-orthodontic guidance exam. It is important for the orthodontist to monitor a child’s dental growth and development to possibly prevent more complicated orthodontic problems in the future.

Enclosed is a stamped return card we would like to request you return to our office today. Our goal is to: 1) get _____ rescheduled in our office, or 2) get your permission to inactivate _____’s clinical records.

Thank you for your attention in this matter. We appreciate you choosing our office. We also want you to know that your referrals are always welcomed. If you have any questions or would like to schedule an appointment, please call us.

Sincerely,

Staff member

Contacting Recall Patients

Return Card (Self Addressed and Stamped)

Patient's Name:	_____
Address:	_____ _____
Telephone:	_____
Options: Please check one	
<input type="checkbox"/>	Please call _____ at _____ number during the day to schedule an appointment.
<input type="checkbox"/>	Please inactivate our clinical record.
<input type="checkbox"/>	Please contact us in 6 months.

4. During the 1 year recall period, one of the following should occur:

- a. **The patient/responsible party will call to schedule an appointment and place the chart back in the active file section.**
- b. **The patient/responsible party will return the postcard indicating the interest in scheduling an appointment, and the phone number and best time to be contacted. Based on the information noted, contact the patient/responsible party, schedule the appointment, and place the chart back in the active file section**
- c. **The patient/responsible party will return the postcard indicating interest in scheduling at a later date due to finances, etc. Place the patient on a 6 month recall and file chart back in the active file section.**
- d. **The patient/responsible party will call to request their chart be purged (remember to encourage them to return the postcard with their signature giving you authorization to purge the card). Give the chart to the appropriate staff member for a letter and then put it in the bin to purge.**
- e. **The patient/responsible party will return the postcard indicating that they are not interested in further appointments. Give the chart to the appropriate staff member for a letter and then put it in the bin to purge.**

Contacting Recall Patients

5. Non-Responsive Recalls:

- a. **After one year, non-responsive recalls without appliances should be purged.**
- b. **After one year, non-responsive recalls with appliances should be sent a special letter indicating that you remove the appliance(s) free of charge.**

Sample Postcard to the Referring Doctor

Dear Dr. _____:

We have made several attempts to reschedule _____ for their pre-orthodontic treatment exam. They have not responded. If there is anything further we can do for him/her, please let us know. As always, we appreciate your referrals.

Sincerely,

Dr. _____

Handling Objections

When you propose orthodontic treatment to a patient or parent there are only four ways they usually respond: 1) They can say yes. 2) They can have an objection. 3) They can give you an excuse. 4) They can ask you a question. Following are examples of how to handle these four situations when they happen:

1. When people say yes to treatment – unfortunately what happens in many situations is that the orthodontist or new patient coordinator continues to talk and give details and sometimes actually talk the patient out of having the treatment in their office. It is extremely important that when someone says yes to proceeding with treatment, you do not make the mistake of trying to continue to give them information that is not necessary. I am certainly not saying to rush patients into treatment, however, be sensitive to what format they would like to use verses your set pattern that you do not waiver from. Many patients come into your office knowing what they want to have done, and they already have confidence in you from your reputation. These people do not need as much explanation or detail as other patients.
2. When someone gives you an objection – the following are more common objections we hear in the orthodontic office:
 - “We can’t afford it.” When someone gives you any type of objection, the most important thing to do is to clarify what they have said to you. People say things they don’t mean. A highly skilled communicator asks the question, “Why do you say that?” Certainly, you can use a cushion before saying this such as, “I understand that many people today have to watch their family budge, however, Mrs. Jones, why in particular do you say that?” From there you will find out information from her that you didn’t have to enable you to help solve the problem. It may be the down payment, it could be something to do with their insurance, or it could be a job loss in the family. Regardless of the reason, the most important thin is to find out why and then answer the objection. The more information you have, the better your ability to overcome their objection.
 - “She/he can’t miss school.” Instead of going directly into all the reasons you have to schedule things the way you do, simply tell the parent, “I understand that being in school is important, however, why do you say that in particular in Suzy’s case?” From there you will find out if Suzy has any particular needs. You can then possibly make suggestions to solve the problem. It is always important to ask “why” and find out what they are thinking.
 - A child might say, “I don’t want to wear braces.” It is very important to turn to the child at that point and say, “Johnny, why do you say that?” You want to find out how the child is feeling and get to the root of the objection.

Handling Objections

- **“I already had an evaluation in another office and the fee was lower.”** I would respond to that by saying, **“We understand that it is important today to get the most value for your money spent, however, why do you say their fee was lower?”** Have them explain to you what the fee was and what the entire fee included. Use that as the basis for explaining the difference in the quotes. Also, use that opportunity to review the high quality standards in your office.
 - **“Does it hurt to have braces?”** You should reply, **“Johnny, am I to understand that one of your concerns about wearing braces is that they will be uncomfortable to wear?”** From there you will get additional information as to what part of wearing the braces he is concerned with and you can appropriately respond to his real concern.
 - **“I think my insurance may be changing.”** Again, I would respond by asking, **“Why do you say that?”** Sometimes people have a well founded reason for thinking that and sometimes it’s just something they may have heard through the grapevine or read in the paper. Then, of course, you can offer to call the company and confirm that.
3. **When people give an excuse in regards to orthodontic treatment, they are usually one of three types: 1) I want to seek a second opinion, 2) I want to talk to someone (i.e. my husband), 3)I want to think about it.** Your goal is to find out what people are thinking and feeling.
- **“I want to seek a second opinion.”** There is a very simple solution to answering excuses, **“Mrs. Smith, what is it that you would like to seek a second opinion about. I am asking this because I want to make sure I have given you all of the information you need in order to make your decision.”** You should have a form (similar to the sample on page 48) to share with this patient.
 - **“I want to talk to my husband/wife.”** I would simply reply, **“Mrs. Jones, what is it you would like to talk to your husband about? The reason I am asking you this is to be sure That I have given you all of the information you need so that you are well-informed and able to make your decision.”**
 - **“I need to think about it.”** I would reply, **“Mr. Jones, what is it in particular that you want to think about? I am asking you this because I want to make sure that I have given you all of the information you need in order to make your decision.”**

Handling Objections

4. The next thing that can happen is for someone to ask you a feeling (or sensitive) type question. It is very important for you to learn how to answer these properly. For example:
 - “What will happen if I don’t have treatment?” There again, answer their question with a question, “Mrs. Jones do you have some question in your mind as to how Suzy would benefit from orthodontic treatment?” From there you will get a better insight into her thoughts. Then give her accurate information concerning the possible risks associated with postponing treatment.
 - “I don’t know if my ex-husband is going to pay his part of the fee.” Ask the question “Am I correct in assuming that if your ex-husband does not agree to pay his portion that you will not be able to make a decision to proceed with treatment.”

In all of these scenarios, you are looking for more information to enable you to help solve patient’s and parent’s problems. The more questions you ask, the more information you will have. The effective New Patient Coordinator learns how to skillfully ask questions so that they can find out what their patients and parents are feeling and thinking. This allows them to answer their objections and have them feel comfortable about making a decision to start treatment in their office.

Second Opinions

If you know that a patient is going for a second opinion, you want to make sure that they are aware of the proper questions to ask at the other orthodontic office so that they are able to make accurate comparisons.

Create a list of questions that the patient can take with them to the next appointment. Prepare your questions based on the advantages that your office has to offer, and be sure that you have covered all of these advantages during your new patient appointment.

Sample of Questions You May Want To Include In Your Form

- Is the doctor a specialist in orthodontics? (Be sure you explain the difference in the amount of training required to be a specialist.)
- Is the doctor Board certified by the American Board of Orthodontics?
- Does the doctor teach orthodontics to area dentists at seminars and meetings?
- Does the doctor give you a treatment guarantee based on your satisfaction?
- Does the doctor use bonded brackets as much as possible rather than using spacers and “old fashioned” bands that are uncomfortable?
- Does the doctor use functional appliances to correct skeletal problems?
- Does the doctor use “space age” wires for improved comfort and performance?
- Does the doctor remove braces in less than 24 months on 90% or more patients in the practice?
- Does the doctor use proper mechanics that allow him/her to reduce the total number of appointments necessary to complete your treatment?
- Does the quoted fee include records?
- Does the quoted fee include retainers?
- Does the practice charge for emergency appointments/
- Does the practice offer flexible financing?

Second Opinions

Ask For Referrals

At the end of the examination appointment, say to the patient and parent: “Dr. Jones and his staff really appreciate you choosing our office. We enjoy meeting patients just like you. If you have any friends or relatives who have been thinking about seeing an orthodontist, tell them we would love to see them.”

Case Acceptance Tracking



Results of OBS & Pending Phase II

	Observation <u>Ready</u> 024	InTx	WCB	Phase II 020	InTx	WCB
January	7	7	0	5	5	0
February	4	3	1	3	1	2
March	6	6	0	3	3	0
April	6	4	2	7	7	0
May	1	1	0	7	7	0
June	9	8	1	5	2	3
July	11	9	2	7	5	2
August	9	9	0	2	1	1
September	6	4	2	5	4	1
October	4	4	0	5	5	0
November	6	5	2	7	6	1
December	5	5	0	3	2	1 No Tx
Totals	59	48	11	44	34	10
	% Acceptance	81.4%	18.6%		77.2%	22.7%

- 380 Patients in an Observation status
- 48 Observations and 34 Phase II started
- Total of 82 Starts for the year
- 82 x \$4,200 average fee = \$369,000 in production

Case Acceptance Tracking

	Quantity	Percentage
Exams Seen	500	
Put into Recall	125	25%
No treatment Recommended	25	5%
Referred Out	15	3%
Potential Starts	335	
Started	240	72%
Pending Treatment	95	28%
95 x 4500 = \$427,500 in potential production		

- 95 Pending patients x Average case fee of \$4,500 = \$427,500 in potential production

New Patient Coordinator Workshop

NEW PATIENT COORDINATOR & PROVEN STRATEGIES FOR MARKETING SUCCESS

INTENSIVE TRAINING WORKSHOP

Charlene White
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FRIDAY & SATURDAY
April 24-25
CHARLOTTE, NC

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**PLUS \$100 OFF YOUR
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EMPOWER YOUR NEW PATIENT PROCESS

- Don't settle for being a 55% closer... learn how to be in the 80% Conversion Club!
- Pump up your production with a powerful pending system
- The secret to "Features tell and benefits sell"
- Master Mom's point of view
- Rev up your recall system
- Triple your tracking tools
- Negotiate like a pro

Register online at www.CharleneWhite.Com, by calling 757-456-0555 or by email: Charlene@CharleneWhite.com