The AAO is the only organization solely dedicated to orthodontic specialists. Membership leaders work to develop tools and support needed to succeed in practice.

You are the AAO.

Visit aaco.org to learn more.

Power Systems for Increasing Ortho Referrals and Starts

Roger P. Levin, DDS
Chairman and CEO

Levin Group, Inc.

Levin Group, Inc.

Levin Group, Inc. - Brief Overview

Levin Group Consultants at our corporate headquarters

Levin Group, Inc.

Roger P. Levin, DDS

Considered the foremost authority on Ortho practice success, Dr. Levin is the Chairman and CEO of Levin Group, Inc., a leading orthodontic management consulting firm.

Dr. Levin is the author of 68 books and 4,300 articles.

Dr. Levin’s honors include being named one of the “Leaders in Dental Consulting” by Dentistry Today for 13 consecutive years, recipient of the Dental Excellence Award for the best practice management consultant from DrBicuspid.com, named one of the “32 Most Influential People in Dentistry” by Benco’s Incisal Edge magazine and one of “The 10 Most Interesting Dentists” by Dentist’s Money Digest.

Levin Group, Inc.

Winston P. Levin
8 Goals for the Successful Ortho Practice

1. Increase ortho production each year.
2. Increase ortho referrals each year.
3. Produce $1,500,000 per Doctor.
4. T.C. closes 90% of all new patients.

5. Complete 98% of patients on time.
6. 40-60% of patients refer one new patient each year.
7. See all new patients within 7 days.
8. Continually improve customer service.

4 Factors for Ortho Success

1. New Patients – First Phone Call
   - Scripting
   - High Energy
   - Build Relationship

2. Treatment Coordinator Close Rate

3. Marketing

4. Customer Service

1. New Patients – First Phone Call
   - Enthusiasm
   - Measure new patient schedule rates.
   - Introduce Treatment Coordinator.
2. Treatment Coordinator Close Rate

- 60 Minutes

15 Success Principles for T.C.’s

1. Call new patient in advance of appointment.
2. Greet new patient within 3 minutes of arrival.
5. Highly positive explanations.
7. Doctor Relationship Drill.
8. Doctor exam.
9. Doctor Q & A.
10. T.C. reinforcement.
11. T.C. Q & A.
12. T.C. fee presentation.
13. Scheduling.
14. Follow-up:
   - 10 minute text
   - 1 week rule
   - 2nd consults

3. MARKETING – 4 TIPS TO INCREASE REFERRALS

1. Siblings
2. Strategies for patients
   - Educational
   - Updates
   - Contests
   - Raffles
   - Differentiation

3. Referring Doctors
   - Powerful Source
   - A = $100,000+
   - Relationship Marketing
   - Touchpoints
   - Organized mathematical strategy

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3. MARKETING – 4 TIPS TO INCREASE REFERRALS

4. Online Presence
   - Website
   - SEO
   - Social Media
   - Blogging
   - Links
   - Go Mobile

4. 18 Pearls for World-class Customer Service

1. Every patient is a V.I.P.
2. Every referring doctor is an uber V.I.P.
3. Ritz-Carlton Service:
   - My pleasure
   - Certainly
   - No problem

5. Smile ALL the time.
6. Learn new things about patients.
7. Shake hands = Professional and confidence.
8. Make eye contact.

9. Don’t multi-task in front of patients.
11. Listen to patients actively.
12. Greet new patients in reception room.
13. Positive body language.

14. Use patient’s name and pronounce it correctly.
15. Wear first name – name tags.
16. Answer all questions – or find out.
17. Say “Please” and “Thank you” all day.
18. Say “Yes” unless it’s illegal.

7 Ways to Simplify the Practice
7 Ways to Simplify the Practice

1. Set customer oriented policies to reduce decisions.
2. Focus on what's important.
   • Team member Top 10 KPI’s
   • Measure results

4. Reduce excess activities and materials → SIMPLIFY.
5. Define business systems.
   • Results are what counts
   • Eliminate distractions
   • Eliminate bottlenecks

6. Always keep improving and learning.
7. Keep chasing GREATNESS!

AAO Donated Orthodontic Services (DOS) Program

All that is missing is You!

• Introduced in 2009, the DOS program provides access to care for children in need. Access to quality orthodontic care is missing in many children's lives. The AAO DOS program mission is to serve indigent children without insurance coverage or that do not qualify for other assistance in their state of residence.

• The program has expanded and offers care to children nationwide in addition to the recognized state programs in Illinois, Indiana, Kansas, Michigan, New Jersey, North Carolina, Rhode Island, Tennessee, Texas and Virginia.

• In order to expand further, we need you to help us by volunteering to serve as a provider orthodontist or help identify orthodontists willing to lead efforts to establish a DOS chapter in your state.

• Stop by the DOS booth here in San Diego to learn more about the program or contact Ann Sebaugh at asebaugh@aaortho.org with questions.

As a practicing orthodontic specialist, you are passionate about every aspect of your professional life. From day-to-day clinical experience to community relations to keeping abreast of the latest innovative treatment options, orthodontics is your life.

Qualified teachers, scholars and researchers have been the backbone of our specialty. The AAO is committed to promoting education for our profession and ensuring the continuance of our specialty.

You can help to improve the picture for orthodontics today by pledging or renewing your pledge to the AAO.

There is no better way to communicate your professional dedication while ensuring the ongoing vitality of our specialty.

To contribute or discuss giving options, please call Mr. Robert W. Hazel at 800-424-1845, ext. 246 at the AAOF offices in St. Louis.

Share the passion and give back to the profession that has given so much to you.