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The Team's Role in the New Patient Experience

A Monthly Article on Practice Management

Presented by Dr. Roger P. Levin and Ortho Technology, Inc.

Orthodontics has become more competitive than ever before—not necessarily from orthodontists competing with each other as much as from new consumer behaviors. In an era where people are more cautious about their spending, the available funds for orthodontics have diminished. Many parents are either putting off treatment, shopping different ortho offices for best fees or negotiating fees with the orthodontist or orthodontic staff. Some are doing all three.

These behaviors are all based in a firm philosophy that has shaped the teaching in all of my orthodontic seminars—people today want more value for their money.

Value Creation in a New Era

It is hard to believe that when I talk about the old days I am referring to three years ago. That is when orthodontists first began to see a decline and patients became more willing to shop around or put off treatment. To address these new behaviors, practices need to increase the value that patients feel when they are visiting an office for the first time. This means that everyone, not just the doctor or treatment coordinator, must play a positive role in The New Patient Experience.

The first person to encounter a new patient is a front desk staff member during the initial phone call. These individuals can begin building trust immediately—if they know the right way to do so. Levin Group consultants have found that in most practices new patients are treated well, but not necessarily in a way that creates value. In the first new patient conversation, the following approach should be used for maximum effectiveness:

- **The greeting includes:**
 - The words, “Thank you”
 - The name of the front desk person
 - A question such as, “How may I help you?”
- Scripting includes a comment such as, “I am delighted that you called, we love meeting new patients.”
- The initial call includes a firm approach to encouraging potential patients to make an appointment. After all, this is the main objective of all new patient phone calls.

- There is a transfer of trust during the new patient phone call that begins with a phrase such as, “Let me tell you a little bit about our practice” and then goes on to comment on the credentials and caring attitude of the doctor and team. This phone call should also highlight benefits of the practice (technologies, clinical skills, fun environment).
- If there is a treatment coordinator, she should be introduced in the first phone call with a confident statement made by the front desk staff person such as, “You will be meeting Julie, our orthodontic treatment coordinator, and everybody loves her!”
- The front desk staff always documents the cell phone number of the new patient caller.
- There should be a pleasant ending such as, “Thank you again for calling. Once again my name is Julie and I look forward to meeting you.”

The front desk staff has a key role in creating value for the practice. By highlighting positive information about the doctor, treatment coordinator and staff, front desk team members are already creating a powerful image of the practice for the parent and/or patient.

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The Role of the Treatment Coordinator

The Treatment Coordinator makes the confirmation call as an introduction and welcomes the patient to the practice. The value at this stage is to create an image of a friendly and caring office that takes the time to provide reminders. This will be seen as positive by the new patient family.

When the new patient and parent arrive, front desk team members must go out of their way to display relaxed, pleasant behavior and let them know that the treatment coordinator will be greeting them shortly. Strive to let new patient families wait in the reception area for no longer than three minutes.

The treatment coordinator should arrive, greet the new patient and parent, and make introductions. She will then provide a tour of the office using benefits-oriented scripting, take any patient records and then meet with the parent/or patient in a private consult room.

At this point, effective scripting builds value throughout the following seven steps:

1. Learning a minimum of 10 things about the parent and/or patient. This serves to strengthen the relationship over the long term.
2. Repeating positive comments about the orthodontist and the team.
3. Examining the mouth and reassuring the parent and patient that orthodontics can deliver an excellent

result. It is important to create confidence, which is one of the main factors that the parent and patient are looking for.

4. Giving a brief overview of orthodontics without becoming so technical that the parent and/or patient become confused.
5. The next step is for the doctor to be briefed prior to entering the consult room by the treatment coordinator so that he or she has full knowledge of the patient and can immediately begin building a strong relationship.
6. Meeting with the parent and patient, engaging in a personalized conversation, examining the patient's mouth and assuring the patient and parent that orthodontics is an excellent choice and answering all questions.
7. Reiterating that orthodontics is highly beneficial, with the orthodontic treatment coordinator transferring trust to create confidence in the doctor and reviewing financial and scheduling protocols.

In all of these steps, scripting is critical—even for the doctor. All scripting should be geared toward creating value. If the parent and/or patient do not become excited about the benefits of orthodontics, there is a risk that they will not accept treatment.

Conclusion

The main goal of The New Patient Experience is to create value. More orthodontic cases are accepted by parents based on a perceived personal relationship than from their understanding of the technical aspect of orthodontics.

Creating value will help practices achieve 90% close rates on new patients. New information, scripting, enthusiasm and motivation all have to be part of the process. The ortho practice that handles this process effectively is the practice poised for steady, long-term growth.



Building TOTAL PRACTICE Success™

Our commitment is to help every orthodontist grow regardless of the economy. Every orthodontic practice has the potential to transform into A Levin Practice™ and anticipate these results:

- Continually increasing production
- Continually increasing profit
- Continually increasing referrals
- A low stress practice environment
- High levels of professional satisfaction
- Reaching financial independence sooner

Our consulting programs are based on proven systems and strategies that have delivered successful results to thousands of practices for more than 24 years. Levin Group Consulting Programs are the established benchmark for practice management excellence in our profession.