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practice management
and marketing news

LCP Dental Team Coaching (the new name for Julie Weir & Associates) is recognized as the premier consulting firm specializing in pediatric dentistry since 1996.

The Ideal New Patient Experience

A patient's first visit to your office is a significant event. When handled appropriately by the doctor and team, it affirms the patient's decision to return to your office for another visit. New patients drive the growth of a practice through increased production and thus, increased revenue. Build your new patient base by providing a stellar experience and a high level of care and customer service.

The new patient experience begins before they contact your office. Your office must be easy to find online with an updated, mobile responsive website. If it has been a while since your website has been updated, consider refreshing its look with new photos and a fresh, renewed design. This should be done every two to three years. Evaluate your online reputation to identify your practice's strengths and areas for improvements. Most parents rely on positive reviews to make the decision to contact your office. What are parents reading about you online?

INITIAL PHONE CALL

- The initial phone call is one of the most critical steps in the new patient experience. This call can be the difference between capturing a new patient or losing a prospective patient to your competitor.
- Create a warm, friendly, welcoming and professional impression. The parent will assess the entire office from this initial phone conversation.
- Set aside distractions and focus on the conversation. Be sure to speak slowly and clearly. The parent does not want to feel rushed.
- "Thank you for calling Dr. Awesome's office, this is Sally, how may I help you?" or "I can help you!"
- Gather the new patient information, insurance information (if applicable), and ask about a special interest of the child to bring up during their first visit. Make them feel like a valued member of your dental family.
- "Johnny is going to love Dr. Awesome and our entire team. Our office is decorated (describe theme) and we have great toys and games. He will have a great experience."
- Schedule the appointment and let them know they will receive an electronic confirmation by (text or email) and to click the confirm option to be sure the appointment is confirmed. This only works if they filled out their new patient registration forms online in advance. If you do not utilize online new patient forms, consider adding this feature to your website to improve your new patient experience and increase efficiency in your schedule.
- If a parent does not fill out the new patient forms online in advance, consider adding an early arrival reminder with your patient communication software. This feature allows the parent to receive an earlier reminder time so that the patient registration forms can be completed prior to the patient's scheduled appointment time.
- Let the parent know in advance your requirements for changing the appointment if needed.
- "If for any reason you need to change this appointment, please contact us at least two business days in advance. We appreciate your consideration and we look forward to meeting you and Johnny. Is there anything else I can help you with?"

OFFICE APPEARANCE

- **Exterior:** As your patient arrives, your signage, building and exterior appearance will make an immediate, lasting impression.
  - Is your building and office easy to locate? Is there additional signage that can or should be added? Do you have a light-up sign?
  - Walk through the front office of your office. Be aware of the landscape, sidewalk, signage, and exterior décor. Are there cobwebs that need to be removed? Would you be impressed as a new patient arriving for the first time?"
  - Take note of any updates that should take place: new foliage and landscaping, washing windows and exterior of the building, fixing imperfections in sidewalk or concrete.
- **Interior:** Have you taken a walkthrough of your office to see it through a patient's eyes?
  - How does your office look, smell and feel?
  - In the reception area, be sure your chairs and furniture are clean and free of tears and marks.
  - Is your décor warm and inviting?

- Identify areas that could use decluttering and organization.
- Your office space is a reflection of your services. Your patients will judge your work by the look and feel of your practice.
- Are the toys cleaned frequently? Are all video games in working order?

CHECK-IN PROCESS

- Upon the patient's arrival, stand up and introduce yourself to the patient and parent. "We have been looking forward to meeting you."
- If the new patient registration forms have not been completed online in advance, have the parent complete necessary forms. Make sure to thoroughly explain what each form is and where they need to sign.
- Consider having an iPad or tablet available to make registration forms easier to enter and read.
- Show parent where the refreshments (i.e. coffee, tea, water) and restrooms are located.
- Show the patient where games, photo booth and any other fun, unique things you have are located to make this a great experience.
- If you are on the phone when a new patient walks in, acknowledge them with eye contact, a wave, and a smile, letting them know they are important and that you will be with them soon.
- Inform the clinical team that the patient has arrived and when they are ready.
- Make the patient and parent feel at home and like the most important person in the world. This initial impression will set the mood for their perception of the team and for their entire visit.

NEW PATIENT APPOINTMENT

- A clinical team member walks to patient and parent in the reception area and introduces self by name and position.
- Ask the parent to go with you so that you can privately discuss their child's information with them.
- Confirm the procedures/treatment that will be done that day. Be sure to communicate clearly the next steps during the appointment to make everyone feel comfortable.
- The clinical team member should bring up a special interest of the child that was discovered during the new patient phone call to create a relationship.
- Clinical team member performs the recommended procedures for the new patient (X-rays, cleaning, fluoride, etc.) and gives parent and patient oral hygiene instructions.
- Hygienist/assistant introduces the patient and parent to the doctor. This helps the doctor know the patient's name without having to search for it.
- "Dr. Smith, this is my friend Johnny. He loves Batman and did such a great job today! This is his father, Bob."
- Doctor introduces self to patient and parent and comments about the personal interest of the child. "Johnny, I also love Batman!"
- Doctor establishes a relationship: "We are here to help Johnny to develop good oral health. We want him to be excited about visiting the dentist and help him maintain healthy habits for life. I will let you know my findings, answer any questions and discuss options for treatment."
- When the doctor goes over the findings with the parent, begin with the positives first. "The good news is…"
- The doctor then should explain the recommended treatment and tie it to benefits and motivators. Why is the treatment being recommended and why should the parent schedule? Explain the consequences of no treatment to the parent.
- The doctor should then hand off the patient to the clinical team member by asking the parent if they have any questions. The doctor should not discuss the financial aspects of the treatment.
- "Mr. Jones, if you do not have any other questions, please give (clinical team member) a moment to enter Johnny's treatment and she will help you from here."

HAND-OFF TO FRONT OFFICE TEAM

- The warm hand-off from the clinical team to the front office team is a critical step that cannot be missed. This reinforces the importance of any treatment recommended and brings together the entire appointment as one seamless experience.
- This process should be handled in a very respectful, carefully planned way and the intention is to never break the chain between patients/parents and another team member.
- Prior to dismissal, be sure that the route slip is ready and completed fully for the front office team to review.
- Check that the services posted to walkout are accurate and that the correct provider is attached to the services. Cross off anything on the route slip that was not completed.
- Walk the patient and parent up to the front desk to check out.
- Proper introductions should be made at the time of transfer. Reinforcing statements are made so the parent hears the information multiple times. The reason to return is emphasized again during this process.
- Clinical team member to front office team member: "Hi Sally, this is Johnny. Today we did (state treatment completed), and Johnny did a great job!"
- Hand the route slip to the person at check out. While facing the parent and front desk team member at the same time, let the parent know there is future treatment that needs to be scheduled.
- Reiterate to the parent the importance of keeping their child's appointment and ask if they have any questions.

CONCLUSION OF APPOINTMENT

- The front office team member should have the treatment plan prepared with an accurate estimated patient portion.
- Present the financial responsibilities of the parent and be sure there are no objections. Parent signs or initials treatment plan and is given a copy. The signed treatment plan is scanned into the patient's chart.
- Reserve the next appointments (restorative and recare) by offering two options for dates and times for each and let the parent decide which one works best.
- Reinforce the importance of keeping their child's appointment.
- Say goodbye to the patient and tell them how great they were and that you are

looking forward to seeing them at their next appointment. Mention something that was of importance to the child. Tell them you wish them well with activity/sport/exam, etc.

FOLLOW-UP

- After the appointment, send a thank you card to the new patient and parent saying how nice it was to meet them and that you hope to keep them smiling for years to come.
- Use your patient communication software to send an automatic email to the parent at the conclusion of the appointment requesting them to leave a review. Be sure to include in this email that the highest compliment you can receive is the parent recommending them to a friend or family member.
- If a pre-authorization is sent to the insurance company for treatment, be sure to follow up with the parent to be sure they do not have questions.

The way your office and your team present will show patients and parents the type of service you provide. The little things that the team can do together to form long-lasting relationships with the patient and parents and make them feel part of your dental family make all the difference. To your patients and parents, their visit is all one seamless experience, so be sure it is also a seamless experience with your team. Consider taking a walkthrough of your office with your entire team from the view of a new patient. Begin in the parking lot, enter your doors to the reception area and through to the clinical area. Take note of small details that could be missed on a daily basis that may be having an impact on the new patient experience. Above all, the goal is a happy patient and parent.

“A person’s most useful asset is not a head full of knowledge, but a heart full of love, an ear ready to listen and a hand willing to help others.”

Unknown

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