Reinventing the New Patient Experience
How to Dramatically Increase Case Acceptance
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The New Psychology of Case Acceptance

10 New Rules of Patient Psychology
1. Patients don’t want to be told what to do.
2. Patients will research on the internet.
3. Patients have their deflectors shields up.
4. Patients think of dental practices as retail.

The New Psychology of Case Acceptance

10 New Rules of Patient Psychology
5. Patients want options.
7. Patients have outside influences.

The New Psychology of Case Acceptance

10 New Rules of Patient Psychology
8. Presentation Matters.
   - Energy
   - Enthusiasm
   - Total focus
   - Sense of service
   - Sense of expertise
   - Team scripting

The New Psychology of Case Acceptance

10 New Rules of Patient Psychology
9. The spending habits of people with incomes of $250,000 vs. $50,000.
10. Consults are key.
The New Psychology of Case Acceptance

9 Tips to Close Cases

1. Take control—retrain the team.
2. Don’t push—Excite!
3. Build deep relationships.
4. Be the expert and the friend.
5. Follow-up then follow-up again.
6. The hygiene opportunity.
7. Your body language counts.
8. When not to present treatment to the new patient.
9. Be open, honest and clear.

The Incredible New Patient Experience

- New patients are key to dental practice success.
- The average production per new patient should be 50% higher in most practices. (Target)
- All new patients over the age of 30 will be seen by the doctor.
- All new patients need to be seen within 7-10 days.

The 3 Phases of the New Patient Experience

1. The new patient first phone call
2. The new patient orientation
3. The doctor new patient exam process
The Incredible New Patient Experience

The New Patient – 1st Phone Call

- Smile before answering the phone.
- Answer the phone in two rings.
- Greet the patient with caring, compassion and V.I.P. excitement.

“Thank you for calling Dr. Smith’s office. This is Sally speaking. How may I help you?”

The New Patient – 1st Phone Call

- Scripting, just like everywhere in the practice is essential.

“I am delighted that you called. We love meeting new patients. Who may we thank for referring you?”
- “Oh, Mr. Jones. He is a wonderful patient and, in fact, we treat his entire family.”
- “Let’s find a convenient time for you to join us as a new patient (Offer two choices).”

Let me tell you a little bit about our practice.” (Write a 60-90 second script about the practice).
- “Will you be using any type of dental insurance so that we can be fully prepared for you?”
- “Do you have any specific dental concerns or issues?”

First Phone Call Role Play

“Thank you again for calling. Once again, my name is Sally. If you have any questions, please feel free to call me. I am looking forward to meeting you.”
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The New Patient – Confirmation Call

1. Call at least 48 hours in advance.
2. Welcome the new patient to the practice again.
3. Ask if the patient received the map and practice packet.

4. Ask if patient received or downloaded new patient forms.
5. Ask if patient has any questions.
6. End the conversation with “looking forward” script.

The Incredible New Patient Experience

The New Patient – Orientation

V.I.P.

• Have an extremely positive and enthusiastic scripted New Patient Orientation.
• The New Patient Orientation is highly customized for each practice.

• Schedule all new patients 20 minutes prior to the appointment.
• Be prepared for the new patient and identify them in the Daily Business Meeting.
• Remember, all new patients are V.I.P.s.

The Incredible New Patient Experience

The New Patient – Orientation

V.I.P.

• Greet the new patient by standing up and coming in front of the desk.
  ▪ This removes any physical barrier and enhances relationships.
  ▪ Shake hands, smile and make eye contact.

• Assistants are introduced to new patients by the front desk coordinator.
• Assistants shake hands, smile and make eye contact.
• Assistants escort the patient to the clinical area.
The Incredible New Patient Experience

The New Patient – Examination Process

- Assistants complete the 2-minute Relationship Building Drill.
  - Learn 1-3 personal facts.
  - Learn chief dental complaint.
  - Learn why patient came to your office.
- Assistants introduce the new patient to the doctor.

The Incredible New Patient Experience

The New Patient – Examination Process

- Assistants promote doctor.
- Assistants introduce doctor to the patient.
- Assistants communicate any special information to the doctor.

The Incredible New Patient Experience

The New Patient – Examination Process

- Doctors shake hands with the new patient.
- Doctors sit at eye level with the new patient.
- Doctors never touch a new patient until they have learned 10 things about them – The Golden 10.

The Golden 10 Exercise

1. 6.
2. 7.
3. 8.
4. 9.
5. 10.

The Incredible New Patient Experience

The New Patient – Examination Process

- Doctors interview new patients to gain an understanding of them.
- This goes to the heart of making patients your friends.

The Incredible New Patient Experience

The New Patient – Examination Process

- People like their friends.
- People trust their friends.
- People like to buy from their friends.
- People refer to their friends.
- People accept case recommendations from their friends.
The Incredible New Patient Experience

The Five Phase Exam

- The exam process is meant to educate patients about each phase individually.
- Cases over $1,500 should not be presented to new patients at the first appointment.
- Follow-up consults are critical.
  - All consults should be scheduled within 7-10 days of The Doctor New Patient Exam.

The Treatment Presentation Appointment

1. Greet patient upon arrival.
2. Offer beverage.
3. Maintain desirable magazines in waiting room.
4. Assistant escorts the patient to the treatment room or consultation room.

The Treatment Presentation Appointment

5. Doctor comments on previous personal knowledge
   - “How is your family?”
   - “How was your vacation?”
6. Doctor follows the rule of number 1.
7. Doctor does the case presentation at eye level.

The Treatment Presentation Appointment

8. Case presentation should be:
   - Relaxed
   - Calm
   - Slow
   - Smiling
   - Upbeat and positive
   - Active listening
   - Note taking
   - Ask questions
9. Limit clinical information to 3-10 minutes maximum.

The Treatment Presentation Appointment

10. Follow the five questions:
    - What is it? (10%)
    - What will it do for me? (10%)
    - How long will it take? (10%)
    - How much will it hurt? (10%)
    - How much will it cost? (10%)
The Incredible New Patient Experience

The Treatment Presentation Appointment
11. Ask for commitment (then be quiet).
12. Answer all questions and objections.
13. Introduce Financial Coordinator.
14. Financial Coordinator reviews financial options.

20 Factors of Great Case Presentation

The Treatment Presentation Appointment
1. Thoroughly prepare for the presentation.
   • Know the patient and family
   • Diagnosis and written plan
   • Review options for treatment and financing
   SCORE: /10

2. Give technical facts.
   • Keep it short and simple
   • Explain dental health pre-conditions
   • Provide information about ideal options
   SCORE: /10
20 Factors of Great Case Presentation

The Treatment Presentation Appointment

3. Treat every patient as a VIP:
   - Individualize case plans to meet needs
   - Realize importance of relationship building
   - Promise excellent service
   SCORE: __/10

4. Anticipate patient’s concerns & questions:
   - What are the patient’s key motivating factors?
   - What are the issues behind the presented case?
   - How can you be proactive to inspire the patient?
   SCORE: __/10

5. Encourage reading of brochures:
   - Third party proof
   - Motivating
   - Positive review of case presentation
   SCORE: __/10

6. Train staff to promote treatment:
   - Set aside time to review and explain services to staff
   - Educate staff about patient motivation
   - Determine strategies to educate patients
   SCORE: __/10

7. Use scripts for role playing:
   - Design effective scripting for all routine conversations
   - Include benefit statements
   - Use key words and phrases:
   - “I’m delighted that…”
   SCORE: __/10

8. Educate front desk staff:
   - Teach technical procedure benefits
   - Encourage patient feedback
   - Role play key conversations
   SCORE: __/10
20 Factors of Great Case Presentation

The Treatment Presentation Appointment
9. Maintain esthetically attractive office.
  • Design reception room for women
  • Modernize operatories
  • Update periodically

SCORE: ___/10

Your Source For Practice Success

20 Factors of Great Case Presentation

The Treatment Presentation Appointment
  • Start with strong and effective leadership
  • Show support of teamwork
  • Compliment successes

SCORE: ___/10

Your Source For Practice Success

20 Factors of Great Case Presentation

The Treatment Presentation Appointment
11. Identify and discuss larger cases.
  • Take time to seek larger cases
  • Educate every patient about elective treatment
  • Continue to plant seeds for future treatment

SCORE: ___/10

Your Source For Practice Success

20 Factors of Great Case Presentation

The Treatment Presentation Appointment
12. Allot time to schedule larger cases.
  • Allow units for significant cases
  • Schedule appointments within 7 to 10 days
  • Communicate in morning meetings

SCORE: ___/10

Your Source For Practice Success

20 Factors of Great Case Presentation

The Treatment Presentation Appointment
13. Increase case presentation of elective procedures.
  • Need-based treatment differs from elective services
  • Emotional vs. logical decision-making
  • Approach for presentation – focus on the benefits.

SCORE: ___/10

Your Source For Practice Success

20 Factors of Great Case Presentation

The Treatment Presentation Appointment
14. Questions related to elective dentistry and the emotional decision.
  • What are the benefits?
  • Will this improve the quality of life?
  • How will it improve the quality of life?
  • Is it work taking the time?
  • Am I making a good decision?

SCORE: ___/10

Your Source For Practice Success
**20 Factors of Great Case Presentation**

**The Treatment Presentation Appointment**

15. Motivating factors for accepting elective dentistry.
   - Identify the “hot button” and address it
   - Clinical or logical discussion and closure
   - Key decision makers

**SCORE: ___/10**

Your Source For Practice Success

**The Treatment Presentation Appointment**

   - Determine dress code
   - Look neat and clean
   - Pull it all together to create your image

**SCORE: ___/10**

Your Source For Practice Success

**The Treatment Presentation Appointment**

17. Train Financial Coordinator.
   - Educate about financial plans
   - Determine techniques and scripts
   - Build in accountabilities

**SCORE: ___/10**

Your Source For Practice Success

**The Treatment Presentation Appointment**

18. Present four financial options.
   - Develop four financial options
   - Discuss benefits and disadvantages
   - Offer financing

**SCORE: ___/10**

Your Source For Practice Success

**The Treatment Presentation Appointment**

19. Track case acceptance rates.
   - Average production per patient
   - Average production per _new_ patient

**SCORE: ___/10**

Your Source For Practice Success

**The Treatment Presentation Appointment**

20. Follow-up with patients that fail to schedule.
   - Follow-up next morning
   - Determine procedure and system
   - One-to-one marketing

**SCORE: ___/10**

Your Source For Practice Success
20 Factors of Great Case Presentation

**IMPROVEMENT LIST:**
1. 6.
2. 7.
3. 8.
4. 9.
5. 10.

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**Case Study**

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Levin Group Case Study

**Practice Profile**
- Dr. Sheila Weathers
- Three-year old self-started practice
- Annual production - $650,000
- Five staff members
- Four treatment rooms
- Four day per week schedule

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Levin Group Case Study

**Doctor’s Chief Concern**
How to grow the practice to $1,500,000 while providing the highest level of customer service.

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Levin Group Case Study

**Practice Potential Analysis**
1. No scheduling goals
2. Practice was not scheduling for production
3. Practice was not using power cells
4. Had a “fill-in-the-hole mentality

*No documented expert systems

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Levin Group Case Study

**Practice Potential Analysis**
5. No morning meetings with no agendas
6. Staff communication skills were 3 out of 10
7. Customer services not at an appropriate level
8. Staff not trained to effective manage patients
Levin Group Case Study

**Practice Potential Analysis**

9. Not enough time in the schedule for large cases
10. Not presenting comprehensive treatment
11. Practice suffered from occasional customer service issues

**Levin Group Method™**

- Vision statement creating in writing
- Specific annual goals established
- Vision and goals shared with the team
- Input and final consensus accepted

**Levin Group Method™**

- Power Cell Scheduling mathematically designed and implemented with 100% capacity increase
- All major systems documented in writing for training and reference

- Staff received PowerScript training
- Staff were trained on the benefits of specific services
- Stage III Customer Service training was initiated

- All patients received information on every elective service offered by the practice
- Effective morning meeting with agendas were established
- A customer service survey was developed and implemented
- A “request for referrals” program was implemented
Thank you

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