

# THE 9 AREAS OF EXPERTISE: CASE ACCEPTANCE



By Roger P. Levin, DDS



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The Last  
Page For An  
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Levin Group<sup>Inc.</sup>



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In consulting relationships with more than 25,000 dental practices since its founding in 1985, Levin Group has developed high levels of knowledge and skill in all areas of practice management and marketing, which we refer to as *The 9 Areas of Expertise*:

1. **Production**
2. **Collections**
3. **Team Building**
4. **Scripting**
5. **Case Acceptance**
6. **New Patient Experience**
7. **Hygiene**
8. **Scheduling**
9. **Marketing**



This whitepaper discusses case acceptance. When dentists need to increase production and profitability, this is one of the first places to look. With new strategies for what and how you present, as well as a better understanding of what motivates patients to say “Yes” (or “No”), you can raise your case acceptance rate to 90% for both need-based and elective treatment.

## Acceptance Begins Before the Presentation

Think of the actual consult as a single stage in a sequence of events. Except for emergencies or situations when a patient comes to you with a specific procedure already in mind, you and your team should lay the groundwork for case acceptance. This preparation takes three forms:

### Patient Awareness of All Types of Care Available

Many dentists are surprised to learn how little their patients know about the range of clinical services available at their practices. This lack of awareness represents the first barrier on the way toward case acceptance. Before patients can think about relying on you to provide treatment they need or want, they must realize that you offer it.

Some of your patients may have bought home whitening kits at the drugstore, unaware that your practice offers better alternatives. Others may be resigned to living with a crooked tooth that you could easily straighten for them. Your edentulous patients could go elsewhere for a solution if you don't let them know you offer implants. The possibilities for missing out on potential production and profit go on.

# THE 9 AREAS OF EXPERTISE: CASE ACCEPTANCE

You have to take the initiative to inform patients about what you offer—and keep them informed. You may have mentioned a type of treatment to long-term patients once upon a time, but you can't expect them to have total recall five or 10 years later. That's unrealistic. Include discussion of services in scripting used by you, the hygienist and other staff members. And use posters, presentation aides and printed pieces to serve as constant reminders of the many ways you can help patients achieve optimal oral health and beautiful smiles.

## Comprehensive Exams and Plans for All Patients

A growing number of dentists have learned the value of performing comprehensive examinations with new patients. Some even understand that they must then translate what they learn from the exam into a detailed and prioritized treatment plan—a road map for case presentations for years to come. But far fewer doctors apply this same thinking to patients who've been with the practice for some time.

To get a clearer picture of the production potential of your patient base, conduct a thorough, five-phase examination for all patients, identifying periodontal, tooth-by-tooth, cosmetic, implant and occlusal opportunities. This exam should be repeated every 3–5 years.

Based on your diagnoses, you can then create a comprehensive treatment plan for all patients. You'll recommend some items in the plan for immediate attention, others that should be addressed in the near future, and still others for the patient to consider down the road. The plan will probably include a mix of need-based and elective procedures. It may also include multi-tooth treatment in some cases.

To avoid giving the impression that you're applying pressure, you should acquaint patients with comprehensive plans. When you do this, note areas of patient interest or disinterest and notate patient records accordingly. As time goes by, these notes (and subsequent ones) will help guide you in what to present and how to present it.

## Trusting, Value-Based Patient-Practice Relationships

From the outset, you want to earn the respect and trust of your patients. They must understand that you have their interests at heart and will provide excellent care... helping them achieve their idea of outstanding oral health.

Your staff can play important roles in this relationship-building process. From the first phone call in the New Patient Experience... to homecare guidance provided by the hygienist... even to reactivation efforts... every practice-patient interaction should be scripted to build value for the practice.

When patients have faith in your abilities, judgement and motives, you're halfway there even before the consult begins.

# THE 9 AREAS OF EXPERTISE: CASE ACCEPTANCE

## Make a Strong Case for Treatment

There are many excellent guidelines and techniques for reaching a higher case acceptance rate. Though you may not want to think of presenting treatment as “selling,” you can adapt proven sales methods to meet your needs. These are approaches developed and used with great effect by the best, most accomplished salespeople—not the stereotypical “used car salesman” types but those who take a more respectful approach. Start with the following:

- 1. Be punctual.** Keep patients waiting past the appointed time for case presentation and you’ll put them in a bad frame of mind before you say a word. Show respect and professionalism by starting on time. It’s a simple yet extremely important rule.
- 2. Give yourself enough time.** Rather than trying to present treatment in a few minutes at the end of a hygiene visit, offer a special 20–30-minute appointment free of charge so you have the time to make a proper presentation.
- 3. Spend a few moments on “small talk.”** You may have a tight schedule. You may not be the sort of person to chat. But it’s important to make a personal connection with patients as quickly as possible. Unless patients are new to the practice, you and your team should have already gathered facts about them—their family, work, hobbies and other interests. Make conversation with these to establish rapport and relax patients.
- 4. Do not allow for interruptions.** Aside from true emergencies, nothing should intrude on your one-to-one meeting... no cell phone signals, no staff members walking in with questions, and, for your part, no shuffling through papers or interacting with a computer unless it’s directly related to the case. The term “undivided attention” applies.
- 5. Have visual aids on hand to illustrate the case.** Your treatment recommendation will be much more compelling if you dramatize it with visuals, whether printed materials, 3-D models, or onscreen schematics or videos. Clinical situations and procedures can be hard for the non-professional to visualize. Help patients understand what you’re talking about and they will be much more likely to accept your recommendation.
- 6. Anticipate possible questions or objections... especially those that are unspoken.** Once you’ve presented cases a number of times, you’ll have a good idea of how patients will react and what goes through their minds. Approach each presentation mentally prepared to deal with these likely issues, even going so far as to answer questions that may go unasked yet still have everything to do with the acceptance or rejection of treatment. Don’t get caught off guard or let yourself show irritation when patients object to what you’re saying. Bear in mind that if you come up with satisfying answers, you may actually be knocking down the final barriers to acceptance.
- 7. Mention your payment options.** High on the list of Frequently Unasked Questions are “What would this cost?” followed quickly by “How am I going to pay for it?” Rather than waiting for patients to bring up this sometimes uncomfortable subject, tell them about your range of payment options (which should include outside financing).

# THE 9 AREAS OF EXPERTISE: CASE ACCEPTANCE

- 8. Replace clinical details with patient benefit statements.** Unless you're presenting to a fellow dentist, take it easy on technicalities. They may mean everything to you but will mean nothing to typical patients. Instead, translate everything into points that are both understandable *and* persuasive for patients. Imagine that you are responding to patients who have asked "What's in it for me?" Talk benefits, because that's what patients want.
- 9. "Ask for the order."** This sales axiom applies to case presentations, too. Don't make your case and then just leave it hanging, waiting for patients to volunteer a response. Simply ask "Shall we make an appointment for treatment?"

## What to Do if the Answer is Not "Yes"

In the new dental economy, patients are more hesitant to agree to treatment that will involve significant out-of-pocket expense. They may also be slow to agree to procedures that might entail long treatment periods, discomfort, inconvenience or other drawbacks. Be prepared for these common reactions.

***If the answer is "No"...*** you'll need to respect that, but all is not lost. Keep the relationships strong and the patients active. If the treatment you presented still makes sense to you, you can bring it up again, with no pressure, in a year or two. A casual mention would suffice, and you may spark interest. Conditions change, people change, and what patients once rejected could look appealing to them at a later date.

***If the answer is "Maybe"...*** you should follow up. If they say they need to "think about it," have your front desk or scheduling coordinator call the next day and ask if they'd like to make an appointment for treatment to begin. You can also offer to provide more information and to bring up the recommendation again, during their next visit. For those who say they need to discuss it with their spouse, offer to participate in that discussion—even if it means scheduling another appointment at no charge. Make it clear that you're not pressing for a "Yes," just wanting to help them decide.

## Conclusion

The old presentation style—stating cases clinically and then waiting for patients to get back to you—no longer works well enough to move practices forward. Using the guidelines discussed here, you can increase your acceptance rate to 90% for both need-based and elective treatment... and grow your production and profit significantly.

## THE 9 AREAS OF EXPERTISE: CASE ACCEPTANCE

### Dr. Roger P. Levin

Dr. Roger P. Levin is a third-generation general dentist and the Chairman and CEO of Levin Group, Inc., the largest dental practice consulting firm in North America. A keynote speaker for major dental conferences, Dr. Levin presents more than 100 seminars per year. He has authored 68 books and more than 4,000 articles. In 2014, he received the Dental Excellence Award for Best Practice Management Consultant from *DrBicuspid.com*. For the past 12 years, he has been named one of the "Leaders in Dental Consulting" by *Dentistry Today* magazine.



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