



THE 9 AREAS OF EXPERTISE: NEW PATIENT EXPERIENCE

By Roger P. Levin, DDS



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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 the new patient experience. New patients have always been the driving force in dental practice production. Now that competition for them has intensified, the way you introduce new patients to your practice takes on greater significance than ever.

The New Patient Experience, in Seven Stages

When you step back from your day-to-day responsibilities and look objectively at what patients—or, more accurately, *prospective* patients—experience when they first contact and visit your practice, you may be surprised. The entire process is more complex than most dentists initially think. More important, there are many more opportunities to make a positive (or negative) impression on these individuals than you may imagine.

To develop expertise in this area and orchestrate a truly excellent new patient experience, look at each of its component stages separately.

1. Awareness of Your Practice

The new patient experience actually begins before you or members of your staff know it's happening. Before prospective patients call your office, they have become aware of your existence and somehow decided to make contact. They may have noticed your sign not far from where they live. Perhaps a broken tooth resulted in an online search. You may have sponsored a community event they attended. Or maybe one of your current patients recommended you.

Although these preliminaries lie outside of your direct control, understand that you can exercise a great deal of influence in this stage. Much of what you can and should do comes under the broad heading of marketing... getting your name out there... being involved in the community... earning positive reviews and comments in social media and on websites... turning your happy patients into referrers... and other reputation-building techniques.

The question is, what can you do to make prospective patients call your practice instead of any other? Fail in this stage and the rest doesn't matter.

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2. The New Patient Phone Call

For one reason or another, someone dials your practice's number and waits for a staff member to answer. If that takes more than two rings, you're already losing points. *Everything* about this first call counts, beyond appointing the caller for an initial visit. It also helps lay the foundation for what you hope will be a long and mutually beneficial patient-practice relationship.

For the front desk coordinator, the call triggers a carefully planned and scripted conversation. In the course of a few minutes, she must:

- Acquire basic patient information
- Inform the patient about office policies
- Begin building value for the doctor and practice
- Schedule an appointment within seven days
- Ask how the patient heard about the practice
- Gather personal facts that will be used later for relationship-building
- Project a combination of professionalism and cheerfulness
- Prearrange for confirmation by texting or calling (preferably to a cell phone)
- Thank the patient warmly for calling

Woven together in a natural way, thanks to role-playing and other training with scripts, this brief exchange will create a strong first impression and prepare you and your team for equally strong follow-through when the new patient presents.

3. Welcome to the Practice and Orientation

The first visit to the practice can be a true make-or-break situation. If patients like what they see and hear as they come through the door, approach the front desk and enter the reception area, they'll begin feeling good about their decision to check out your practice.

Among the many things you'll need to get right during this part of the new patient experience are:

- A warm personal welcome (by name) from the front desk coordinator, who, if possible, comes out from behind the desk to shake hands
- A spotlessly clean, orderly, and attractively decorated reception area
- Overview of insurance participation and payment policies
- Assistance in completing forms
- Explanation of the practice's extensive and thoughtful patient amenities (including restrooms)
- Discussion of doctor and staff credentials, services available (ideally accompanied by a new patient information packet or practice brochure)

Many dentists like to come out to the reception area to greet new patients personally—a powerful demonstration of interest in the patient.

As important as this welcome is, time waiting in the reception area should be kept to an absolute minimum.

When the dental assistant or hygienist comes out to take new patients back, they should be introduced by the front desk coordinator. As they lead patients back, they should explain the layout of treatment areas, point out advanced equipment and other highlights, and introduce patients (again, by name) to any staff members they encounter.

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4. Comprehensive New Patient Examination

As you know, new patients typically account for more potential production than established patients, especially if they have not been seeing a dentist regularly. Start the new patient-practice relationship by accurately defining this potential so that both parties can be fully informed about the state of the patients' oral health and needs.

Levin Group consultants teach clients to use the Five Phase Exam™ to systematically diagnose all dental problems that need to be solved immediately or eventually, as well as conditions that patients may want to address. The exam phases are:

- 1) Periodontal
- 2) Tooth-by-tooth
- 3) Cosmetic
- 4) Implant
- 5) Occlusal

By performing this exam during the first visit, you'll not only map out future production. You'll also impress patients with your thoroughness and begin the relationship with full knowledge of the new patients' oral health status.

5. Comprehensive Treatment Plan

With what you learn from the exam, you'll be able to map out a complete treatment plan. During this first visit, you would recommend treatment for meeting immediate needs. You should also explain other needed or elective procedures you will want patients to consider in the near or more distant future. Rather than formally presenting these other treatment options at this time—which could feel like undue pressure and be off-putting for patients—simply mention them. Document them in a comprehensive treatment plan so you can bring them up again when the time is right.

6. Payment Options

The cost of care can become a major barrier for patients with extensive treatment needs, no or inadequate dental insurance, or generally limited financial resources. The first visit to your practice is an excellent time for you or your finance manager to at least briefly explain how your practice helps patients pay for services. Doing so will further reinforce the impression that you and your staff are dedicated to serving patients in every way possible.

Levin Group strongly recommends that you offer diverse payment methods for major cases so that there will be something appealing to everyone. The specific options will vary based on your preferences and what may be customary in your area, but a serviceable list would include:

- A discount for full payment by cash or check prior to treatment
- 50% to start treatment, 50% on completion
- Acceptance of major credit cards
- Outside financing, arranged through the practice and provided by a reputable finance company

You may want to produce a simple printed handout with information about these options. Naturally, when patients are being asked to commit to substantial outlays in the future, you should again present your payment options.

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7. Scheduling the Next Appointment

The final stage of the new patient experience—and the final part of every appointment for all patients—is to schedule the next visit, whether for accepted treatment or for a hygiene visit. Though you may have given new patients an excellent experience and convinced them that they made a great decision by choosing to come to your practice, don't relax and assume they will now be loyal patients.

In the new dental economy, you can't afford to take anything for granted. The attentiveness and care you exercised in bringing patients in for the first time should continue. In fact, you and your team should search constantly for ways to make the next appointment even better than the last.

Conclusion

New patients have become a more precious resource than ever for dental practices. Create an exceptional experience for them—as described in these seven stages—and you'll be well on your way to maintaining a large and productive patient base for the rest of your career.

The 9 Areas of Expertise cover every aspect of successful practice operation. By learning about these areas and seeking professional coaching and training to enhance all nine skillsets, practice leaders can grow their practices—and increase their personal satisfaction—in today's challenging economy.

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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ADDITIONAL RESOURCES:

The Platinum Library

Get all of Dr. Roger P. Levin's best-selling e-books in one easy-to-download purchase. Learn the practice management and marketing essentials for growing your practice from the foremost authority on the business of dentistry. **Save 10% when you purchase these books as a set rather than separately.** Go to: www.levingroup.com/store/libraries.html.



The Practice Performance Analysis™

Get the peace of mind you deserve, with a Levin Group Practice Performance Analysis™. More than 6,800 dentists and specialists have used this analysis to gain a better understanding of their practices and increase production.

The analysis is conducted by a Certified Practice Analyst at your office with minimal interruption to your business operations. During the assessment, the analyst will examine your practice's operations... pinpoint under-performing areas... and give you solutions for increasing production. Special price is \$1495, a \$500 savings.

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