

# SPECIAL OFFICE MANAGER SECTION



This year, *DE* is bringing you articles for sharing with your office manager.

Look for this special section quarterly, with articles by top practice consultants and office managers.

# COOPERATION

## makes great things happen



Jenny Reid

**WHAT'S THE ONE THING DENTAL TEAMS SHOULD ENCOURAGE** to help their practices and patients thrive? Cooperation. It's the "one team, one dream" philosophy where everyone pitches in to make good things happen.

In a culture of cooperation, whenever someone needs help or something needs to get done, there is never a situation where a team member thinks, "That's not my job." Why? Because when we all believe we're in it together, it's everyone's job to make it to the finish line, which is happy, healthy patients.

Here are a few key ways that we enhance cooperation, both within our team and with our patients.

**Keys to cooperating with one another**  
*"Communication is the key to cooperation among team members."*

Communication can take many forms, and one of the most important ones is the hand-off. As a team, we want patients to feel a sense of continuity. Why? Because continuity fosters trust.

Instead of using terms such as "front office" and "back office," which imply a division in the practice, we use the terms "administrative team" and "clinical team." Our administrative team does a great job communicating with our clinical team about all the information the patient shares with them. It's not just the responsibility of the person who answers the phone or who welcomes the patient to the practice to do this. Everyone works hard to connect with

patients because patients share different things with different people.

*"Work together as a team to notate in the patient's record key information that enhances the patient experience and clinical outcomes."*

Our clinical team never has to ask a patient what he or she is in for that day. They know in advance because the administrative team has communicated this to them already through the patient file. We communicate it again when we introduce the patient to the dental assistant. We use the same type of communication process as patients check out. At our practice, patients are escorted to the check-out area by the assistant, who shares details about the care provided that day. This ensures that what happened in the clinical area is accurately reflected in the computer.

**Keys to cooperating with patients**

*"Patients have different clinical journeys, but they should know we are with them every step of the way and will help get them to their goals."*

Sometimes "going every step of the way" means staying late so a patient can juggle work and family responsibilities. Or it could be working together to customize a financial solution that optimizes a patient's benefits and gives the patient an option, such

as CareCredit, so they can pay a portion of their bill without stressing the family budget. Or it could mean taking the time to educate patients to the level of detail they want. Our practice is an education-focused group. Our doctor-owner used to teach at the local university, so it's just part of our culture. Some patients want to know just topline information, while others want a deeper understanding to be able to make good health decisions.

*"When we are all working together, cooperating, and communicating, the relational and clinical outcomes are always positive."*

It makes the whole team feel good when patients share how pleased they are with our practice on social media and in response to patient surveys. It is so valuable to get this type of feedback consistently, and it validates what we invest so much of your time doing—delivering great patient care. In the end, the one thing that a dental team can do to help the practice thrive is to be exactly that—a team—working toward the same goal: good oral health. **DE**



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American Association of Dental Office Managers since 2006. She loves collaborating with dental professionals to keep up on the latest dental trends.

# 6 STEPS

## to minimize failed appointments

Lois Banta

**BASED ON MY CALCULATIONS**, it costs practices tens of thousands of dollars in lost production opportunity when patients cancel or no-show. Helping patients remain committed to their appointments starts long before appointments are made and continues through the confirmation communications. Put another way, each step in the patient journey—from creating value to codiagnosing to making payment arrangements—is critical to minimizing cancellations and no-shows. Here are six steps office managers can focus on to reduce failed appointments in their practices.

### **Step one: Preappointment communication techniques**

Creating value patients desire needed dentistry involves the entire team. It starts by identifying patients' "want" factor. What about their smile would they change if they could? Do they want a whiter, brighter smile? Do they dislike the shape of their teeth? Does food get trapped between their teeth? Do they have tooth pain? Once your team can identify what patients want to change, the doctor can diagnose what they need and address what they want.

### **Step two: Get your patients involved by codiagnosing**

Creating value is not an isolated conversation with a patient. By asking your patients open-ended questions and encouraging a free-flowing dialogue between patients and the practice, you can get patients involved in their dentistry. Open up the discussion and get patients to share more of their story regarding their teeth.

### **Step three: Uncovering hidden objections to dentistry**

The two primary reasons why patients cancel or miss dental appointments and do not get the care they need are fear and cost. Unfortunately, patients are often reluctant to discuss these issues. The team needs to develop and use exceptional verbal skills to uncover these barriers.

### **Step four: Handling the fee discussion**

Another interaction that sets the stage for failed appointments is the fee discussion, which directly involves the hidden barriers of fear and cost. Technology and education can help most patients overcome their fears. It's up to the team with their exceptional verbal skills to offer patients payment options to help them overcome cost barriers.

We have found that when payment is tied to an appointment, patients are more likely to cancel or no-show. By setting up easy payment arrangements for your patients, such as offering a 5% courtesy for full payment or accepting the CareCredit health-care credit card, patients are more likely to keep their appointments.

### **Step five: Confirmation communications**

In an effort to minimize failed appointments, many practices use confirmation letters or postcards. Although this may seem like an effective and efficient way to communicate with patients, it can also provide patients with an invitation to cancel. Instead, use reminder cards to get patients to acknowledge receipt of the card.

When patients call the practice, a team member can easily segue into a conversation to mark the appointment "confirmed" or offer them a courtesy call before the appointment.

### **Step six: Handling cancellation calls**

Rather than accepting patient cancellations and rescheduling, it's important that you talk with them and help them understand how delaying treatment can affect them. For example, you can explain that delays sometime aggravate current problems or increase costs in the long run (due to not addressing problems early). When you give patients permission to cancel, you give them an opportunity to not reschedule their appointments.

When patients call to cancel, I advise the following:

- Be concerned and disappointed. Ask each patient, "What can we do to help you keep this appointment?"
- Never give patients the next available appointment. Instead, reserve their next appointment out approximately four to six weeks. Then, offer to put them on your priority list if you get a change in your schedule.

Remember: when your dental chair does not have a patient in it, you are temporarily unemployed! **DE**



**LOIS BANTA** is CEO, president, and founder of Banta Consulting, Inc. Banta has been involved in dentistry for more than 30 years. Through Banta Consulting, she shares her expertise with dental practices both large and small across the country and internationally. As a sought-after speaker, her seminars are a valued resource for every member of the dental team.

# HELP YOUR PATIENTS value and keep preventive appointments

Rachel Wall, BS, RDH

**PREVENTIVE HYGIENE APPOINTMENTS** are a critical component of patients' oral and overall health. Still, many patients don't fully understand the benefits and value of these appointments. As such, they are more inclined to delay or cancel, which leaves them vulnerable to decay and disease. It also leaves your practice with open time on the schedule.

Communicating the benefits of the preventive hygiene appointment can:

- strengthen patient relationships;
- encourage patient referrals;
- create a healthy physical foundation for clinical treatment to prevent disease and decay; and
- help identify issues early so care can be scheduled and patients can get healthy.

Here are four ways you can help patients value, schedule, and keep their preventive appointments.

First, make sure everyone on the team understands the role that preventive appointments have in your patients' and practice's health. Second, choose words that reflect the value of the care provided. It's never "just a cleaning." It's always a preventive appointment or oral wellness exam. Here's an example of how this might sound when discussing care with a patient:

"Mr. Jones, we are so pleased you have chosen our practice for your dental care and are ready for your first preventive appointment. Preventive appointments are an important part of your oral and overall health. The appointment takes about an hour and I've reserved time with Rachel, our hygienist. Rachel is going to do an oral cancer screening and make sure there isn't any infection in your gums or the bone that

surrounds your teeth. She will be evaluating your oral wellness and will alert the doctor should she find any areas of concern that need to be treated before they become larger issues. She will also remove any biofilm, or

It's never "just a cleaning." It's always a preventive appointment or oral wellness exam.

built-up bacteria, that is on your teeth and under your gums. I'm glad you know how important this appointment is and how oral health issues can impact your overall health."

Third, have the hygienist personally schedule the preventive appointment. Let the patient know that once the appointment is scheduled, it is verified and confirmed. Again, here's an example of how this conversation may sound:

"Mrs. Jones, you are all done with today's preventive hygiene appointment. Based on your oral health, we would like to schedule your next preventive appointment in nine

months. Because patients today have a better understanding of the importance of preventive hygiene, my schedule fills up weeks in advance, so scheduling now will ensure you get a convenient appointment time. Please be aware that when I reserve time for you on my schedule, I consider the appointment verified. Are Tuesdays best for you?"

Lastly, be descriptive in the care that will be provided during the preventive exam and the benefits of that care, including screening for oral cancer and the removal of biofilm. Here is an example:

"Mrs. Jones, it's good to see you again. Let's talk about what we're going to do today. First is an oral cancer screening. The Oral Cancer Foundation recently found that every hour of every day one person dies from oral cancer, so we take this screening very seriously. I will also evaluate your oral wellness. Should I find any areas of concern, I will bring the doctor in to take a look. Does that sound like a good start?"

Use these techniques and you will begin to see a change in your patients' attitudes toward care—and in your scheduling. **DE**

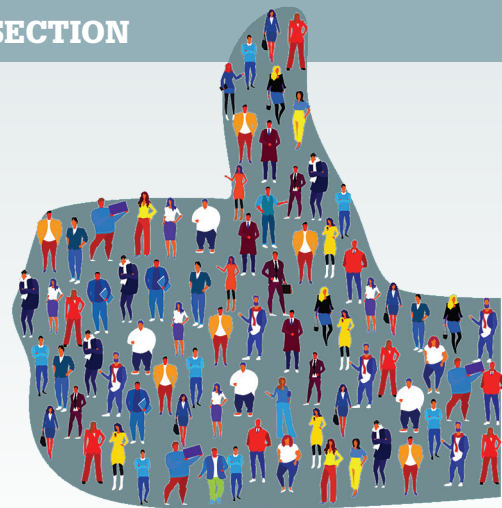


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high-quality periodontal care, enrolling restorative care through hygiene, and managing hygiene logistics.

# SUCCESSFUL social media strategies

Rita Zamora



**PEOPLE TODAY EXPECT** easy access to information. They want that information when they want it and how they want it. They even expect this when it comes to dentistry. With this in mind, here are several proven strategies your team can use on social media, including Facebook, Twitter, and Instagram, to attract new patients, communicate with existing patients, and promote your unique qualities and services.

## BE MORE THAN SOCIAL—BE STRATEGIC

We live in the Discover Economy, where people actively seek, share, and discover new products and services through social media. So how do you put together a successful social media strategy? Here are four steps to get started.

### Step one—create your story

Craft a one-page strategy document that includes the consistent and purposeful story that you want to share with people about your practice. The document should also have roles and responsibilities, budget and other resource allocation (such as time), and success metrics.

### Step two—plan your calendar

Proactively plan how you are going to share this story online. I recommend creating a 12-month calendar based on your story. For example, let's say philanthropy is a big component of your practice, and your doctor wants to do more short-term orthodontics. Your practice's social media calendar could start with a quarterly event that raises money for an appropriate charity. The pre-, during-, and postevent social media posts would be put on the calendar. Then you would add content that appeals to those

patients who may be candidates for short-term orthodontics. This content could be educational (all about clear aligners), inspirational (the benefits of a beautiful smile), or promotional (have a short-term orthodontics day).

### Step three—add seasonal messaging

Next, add seasonal events or messaging, such as back-to-school or end-of-year benefits, and information that may help patients overcome barriers to care, such as sedation (fear) and financing options with a CareCredit credit card (cost).

### Step four—make it personal

Get personal and let your personality shine through by adding “fun stuff” like birthdays, celebrations, team retreats, contests, hobbies, etc.

Once you've done all this, you should have a strategic and strong calendar ready to be implemented on your practice's social media.

## BE A SOCIAL SUCCESS

The time and resources put into your practice's social media should produce a measurable return on investment. Here are a few ways to measure your success:

**Visibility**—It's important that you're

visible to current and prospective patients in your neighborhood. This can be measured through the reach of your content—specifically how many people in your area you reach on a consistent basis. Is that reach growing? Facebook can provide this information for you via the Insights tab, which is located under the Page Views section of your practice's page.

**Lead generation**—It's also important to drive people to your website, and if it's designed for conversions, you can measure the lead through to appointment or request for information.

**Specific promotions**—Create product or treatment promotions (clear aligners day) and fun contests only marketed through your social media channels and measure the response.

**Intake forms**—Your patient intake form should include a place for patients to let you know if they have seen your practice on social media. List your social media sites and ask patients to follow you. This encourages patients who have not seen you on social media to look for you.

That's it! You're now ready to take these proven social media strategies and begin tracking the results. **DE**



**RITA ZAMORA** is the author of the new book *Get Found, Get Liked, Get Patients—Making the Most of Social Media*. She is an international speaker and the owner of Rita Zamora Connections, a social media marketing agency for dental and

medical professionals.

Your team has a way to help more patients get care.

It's super easy and super powerful.



When patients have a patient portion, your team can save the day and fill the schedule by letting them know you have the CareCredit credit card as a financing option — before cost can become a barrier to care. It's a super easy and super powerful way to help more patients get care.



**FREE Resource:** Request your FREE *Great Patient Conversations* kit filled with scripts and tips to help you have great financial conversations.

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