

Special Office Manager Section:

Exceptional patient communications

As an ongoing feature, *Dental Economics* brings you articles for sharing with your office manager and team. This month we focus on patient communications, which may be even more critical as patients begin returning to the practice for care. Authors Bete Johnson, Katherine Eitel Belt, and three office managers share insights and advice on how to make sure your message is clearly communicated, how to use communication protocols instead of scripts, and unique ways to let patients know they are valued.

Look for this special feature quarterly, with articles by top practice consultants and office managers. Find previous features on dentaleconomics.com. Search "office managers."



Say one thing and say it well

Bete Johnson

What has happened in the world recently—and in dentistry—is unprecedented. As we look toward recovery, it's important we communicate consistently. There is comfort and confidence in consistency. No one likes mixed messages. When we consider the idea of “patient communication,” it encompasses pretty much everything, including what you say and how you say it. It even includes how you look, because you, your team, and your practice tell a story without even saying a word. When we consider patient communication in these holistic terms, the best practice is to deliver one core message and say it well—meaning that all communication, verbal and nonverbal, must be consistent. Why? Because consistency increases awareness and understanding.

DECIDE YOUR MESSAGE

If you could deliver one core message to patients, what would it be? And, conversely, if patients could deliver one message to

friends and family about your practice, what would you want it to be? Take a few minutes as a team to fill in the blanks below:

- If we communicated just one message to patients, it would be that they should choose our practice because ____.
- Patients who refer friends and family would refer us because they believe ____.

Hopefully, the answers to both of these questions are consistent. This demonstrates that the foundation of your patient communications is strong, which means patients will hear, experience, understand, and then believe your core values are transparent and true.

THE JOURNEY BEGINS

If you feel that whatever message you and your team want to communicate is being delivered purposefully, consistently, and expertly, then you can turn the page and move on to the next article. But, if you think there's room for improvement, then I invite

you to go on a little (patient) journey with me where we get practical in application of this idea. Let's say the team at ABC Practice does the exercise above and decides that the one message they want to communicate to patients is that *ABC Practice delivers a unique and exceptional experience that delights patients*. Every patient interaction, whether it's online, on the phone, or in person should align with this message.

Using the ABC Practice example above, let's start from the beginning—the first moment of contact, which could be a lot of things, but let's look at the practice website. The practice website should provide patients with a unique and exceptional experience. So, what does that mean? Well, it should be easy to navigate, simple to understand, consistent in messaging, and focused on the *patients'* perspective. In the past, most sites featured Dr. Wonderful and listed his or her credentials, believing that was the primary reason patients would choose the practice. Today,

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Again, thank you for everything you are doing to make a difference during this time of need.



the story is more about why patients find the doctor's treatment and their experience in the practice exceptional, told in a way that sets expectations and communicates the core message. For example, I was recently in a part of the country where it rains quite a bit. The practice team decided that when it was raining, their elderly patients' in-practice experience should start at their car doors, where they were met with an umbrella, and not the practice's front door. This story, shared by a patient on the practice website, communicates the core value of "exceptional and unique" more effectively than a listing of Dr. Wonderful's credentials.

THE JOURNEY CONTINUES

The next point of contact in the patient journey is the new-patient phone call. If a patient calls ABC Practice, which of these greetings would best communicate their core message (unique and exceptional experience)?

- A. "Hello, ABC Practice, can you hold, please?"
- B. "Hi, this is Bete. We're happy you called ABC Practice. How can I be of assistance to you today?"
- C. "Hello, this call may be recorded for training purposes."
- D. "Hello, ABC Practice. This is Bete. What insurance do you have?"

My hope is you chose "B" and can see how that greeting—delivered with *authenticity*—would be welcoming. Why? Because it shows gratitude (thank you), it is personal (my name is Bete), it shows they look forward to answering the call (instead of it interrupting their more important tasks), and that patients will receive the assistance they need.

Then there is preappointment communication, a critical patient contact point that should be as purposeful as the rest. Make sure it aligns with the core values (unique and exceptional), again from the patient's perspective. For example, preappointment communications should be delivered the way the patient prefers—by text, email, or phone.

When the new patient arrives at ABC's front door, the experience and messaging should be consistent and leave a positive, lasting impression. Team training ensures that all communication uplifts the team and practice and helps educate the patient. For example, instead of saying, "This is Mary, our financial coordinator. She will work with you on cost

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and payment options," the transfer would sound like, "This is Mary. Our patients love Mary because she makes the whole financial aspect of care simple and easy by optimizing your insurance benefits and providing convenient payment options such as the CareCredit health-care credit card. She's a pro at making care fit into your lifestyle and family budget."

Exercise: Make a list of your patient points of contact and discuss as a team how to make them consistently and effectively communicate your core value.

- Website
- Social media
- Initial phone call
- Greeting
- Practice environment
- Team transitions and handoffs
- Etc.

The amazing thing about great patient communication is that you and your team are absolutely, 100% in control of the message(s) you deliver to every patient, every time. You choose the one message you want patients to hear. You choose what to post on social media and on your website. You choose how to discuss fees and the value of care. And, ultimately, because the patient journey continues long after the appointment, you choose whether patients become long-term advocates. **DE**



BETE JOHNSON, a 25-year sales, marketing, and practice management veteran, is senior vice president and general manager of dentistry for CareCredit. She has received recognition as one of the Top

25 Women in Dentistry and been awarded the Linda Miles Spirit Award. Through her engagement with dental professionals, including consultants, associations, practices, and dental suppliers, Johnson provides the opportunity to network and create new relationships that benefit the dental profession.

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Dentistry unscripted

Katherine Eitel Belt

Scripts. Just the word makes many people cringe. The past few months have significantly impacted the dental industry. As patients begin to return to practices, how we communicate with them becomes even more important. We've all been victim to that call from a salesperson who robotically reads a script without any attempt to engage us as humans. Word-for-word scripting robs people of their ability to adapt to the conversation and real person in front of them. It robs them of their own power, the confidence that they can make a good decision in the moment and that they can be open and listen to what the patient or customer is asking of them. And finally, it robs them of their ability to just connect on a human level. Still, we want great patient communication that is consistent and delivers positive results. How can we do that without scripts? The answer is with protocols. Protocols set up the framework for any and all situations while giving the team a voice and allowing them to be who they are. Here is a four-step protocol for frontline teams.

STEP ONE: GET CONNECTED

Each patient communication opportunity should have an agreed-upon protocol. There should be a protocol for new-patient phone calls, team handoffs, the financial conversation, postcare follow-up, and more. Let's use the new-patient phone call as an example. Step one is to make a connection with the patient. This is very important and can be done in two different ways. The first is making a personal connection. Maybe it's something happening in the community

where they live or work, or their relationship with the one who referred them to the practice . . . anything that gives the team the opportunity to connect.

"Thank you for calling XYZ Dental. This is Sandra. How may I help you?"

"I need to make an appointment to see the dentist."

"Great. May I ask which of our patients told you about Dr. Smith?"

"John Doe told me about her, and I checked your online reviews. They are really good."

"Oh, John Doe. He's such a great patient of ours. Is he related to you? A neighbor? We're going to want to thank him for the referral."

"He's a friend. We went to high school together."

The second is connecting with empathy. This happens when the patient's urgency is high, maybe there is discomfort, or there is another issue that is causing them stress.

"Thank you for calling XYZ Dental. This is Sandra. How may I help you?"

"I'd like to schedule an appointment, I think"

"Okay. You sound a bit hesitant. May I ask why?"

"I guess I really have a fear of the dentist. Sounds silly to you, I know."

"No, not at all. A lot of our patients at first were hesitant to come in for that exact reason, but now look forward to their appointments. When you meet Dr. Jones and our team, you'll understand why."

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Here's what we say!

We turn the spotlight on three outstanding office managers for their patient communication advice

Contributions by Debbie Evans, Bea Camacho, and Michael Cruz

Great patient communication can take many forms—from texts to phone calls to face-to-face conversations. One thing they all have in common, though, is that they are thoughtful. Office managers and practice administrators from across the country have shared their unique ideas and advice on how to best communicate and engage with patients.

Patient communication starts from the first time patients engage with the practice, which could be the practice website, social media, or that initial phone call, and continues after the patient has left the practice.

Here are a few ideas that may spark inspiration for you and your team to thoughtfully have great patient communication.



IT'S CHEERS IN HERE

Debbie Evans, an office manager in Raleigh, North Carolina, shares, “We use what we call the ‘Cheers’ welcome. Like the song says, ‘a place where everyone knows your name,’ here at our practice we greet every patient by name when they walk in the door. It’s not a surprise that they’re there; they have an appointment. So, there’s no reason we shouldn’t greet them by name. To help, we take pictures of all of our patients, so even if it’s been a while since we’ve seen them or we’ve only seen them once or twice, we know who they are simply by looking at the computer. This

way, we can look up when they come in, smile, and say, ‘Hi, Dave, it’s really good to see you!’ I think it’s human nature that everyone likes being known and remembered by name. It’s a little thing, but I think it makes a big difference.”



SAY IT AGAIN, SAM

Repetition can help increase understanding. Again, repetition may help increase understanding. That’s why office manager **Bea Camacho** from Round Rock, Texas, said, “Great patient communication happens when there’s understanding. At our practice we use the ‘handoff’—or how the patient transitions from one team member to another—to repeat and reinforce the patient’s dental needs. Let’s say the hygienist is with the patient and sees an area of concern. She briefly brings it to the patient’s attention. ‘Mrs. Jones, I’m a little concerned about this tooth here. I’m going to ask the doctor to come take a look.’ Then, when the doctor comes in, she says, ‘Doctor, I’m concerned about caries in number 12. What do you think?’ The patient coordinator then comes in, and if the doctor diagnoses needed dentistry, the coordinator is told, ‘Joy, this is Mrs. Jones. Doctor has done an examination and today we see the priority is number 12, as we discussed. Doctor is recommending this type of treatment.’ Joy then leaves to complete a treatment plan and work on the financial aspects of care. As the

patient is escorted up front by the hygienist or assistant, the information is repeated again as the patient is handed off back to Joy for the treatment plan and payment conversation. 'Joy, I did a cleaning and fluoride. Doctor also came in to look at number 12 and he is concerned about that tooth. This is a priority and we need to get Mrs. Jones back in for treatment.' Joy reviews the treatment plan, insurance, cost, and timing with Mrs. Jones, who has now heard the concern, diagnosis, and need for treatment four times, helping her internalize and understand the urgency for care."



DON'T SAY A WORD!

"You can say a *lot* to patients without saying a word. That's the best type of communication," said **Michael Cruz**, office manager or "zookeeper" in a busy practice in Las Vegas, Nevada. "It's doing the little things and the unexpected big things, without being asked. When you look at everything from the

patients' perspective, it's easy to find ways to communicate how much they are valued without saying a word. For example, we have a signature scent, so we smell great. We have hand lotion in the bathrooms and warm towels and TVs in each operatory where the patient controls the remote. We treat our best patients to social events, such as movie screenings. We have implant care packages filled with soup, books, and more to help with their recovery. We have an 'I've finished' basket to help our clear aligner patients celebrate when they've finished treatment. Once we overheard a patient

saying he couldn't get into one of the hot restaurants in town, and we were able to call and get him a reservation. All of these things don't require conversation, but they certainly communicate how much we value and appreciate our patients."

PUT IT ALL TOGETHER

From what you say to what you don't say, great patient communication takes many forms. The question is, what do you want patients to hear, believe, and feel when they are at your practice? **DE**

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BEA CAMACHO began her dental career in 1984 as a dental assistant and later moved to the front office. She now manages the office of Jeremy T. Louk, DMD, in Round Rock, Texas. Camacho helped in founding the Austin chapter of the American Association of Dental Office Management. She has been a proud member ever since.

MICHAEL CRUZ manages Dee for Dentist in Las Vegas, Nevada. Cruz owned and operated a number of local small businesses before finding his calling in dentistry. In 2011, Cruz and his wife, Dee Dee Meevasin, DMD, opened Dee for Dentist. Cruz serves as founder and president of the Southern Nevada chapter of the American Association of Dental Office Management.

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STEP TWO: DISCOVER WHAT'S IMPORTANT

Step two is discovery. We want to make sure we have the information needed to give the patient the right type of appointment. And we want to know what is important to them so we can connect it to a treatment or service the practice provides. For example, if the patient's first question is, "How much do you charge for a crown?" we might respond, "You asked about the cost of a crown and I want to help you with that. I just want to make sure I give you the right information. May I first ask you a couple of questions? Have you been told you need a crown by someone?" The patient will then let us know if he/she has already seen a dentist, went online to Dr. Google, or is shopping for someone else. We also know, based on the question about cost, that money may be a consideration.

STEP THREE: OFFER A SOLUTION

The third step is to offer a solution. First, we give them an appropriate appointment that will solve their clinical needs. Then, we connect a practice benefit to what's important to the patient, which—in this example—is money. "I just want to let you know that you couldn't have picked a better practice to call. If cost is a concern, here's what I promise. Once we know what you need for sure, we will work together to find a payment option that will allow you to get the care you need without stressing your budget. We're highly successful

with making payment arrangements that work for patients, so we really look forward to showing you what's possible."

STEP FOUR: GIVE AND GET DETAILS

Finally, step four is another set of questions we call "details." This is where we ask for address and email, give directions, and guide them to the website. We gather all of the information that we either need to get from a patient or give to a patient to ensure the appointment goes smoothly. This is not a script, but I do recommend memorizing the protocol as a guide.

Ultimately, great patient communication is authentic and sincere. It comes from the heart and it has personality. It's time to embrace protocols that provide the framework but also enable each team member to be themselves. When communication is authentic, real, and unscripted, it can create understanding and patient connections, which may result in case acceptance. **DE**



KATHERINE EITEL BELT is health care's unscripted communication coach. An international keynote speaker, author, and coach, Belt is best known for helping professionals develop phenomenal unscripted client communication skills and intuitive team leadership as well as train-the-trainer and executive speakers programs. With 30 years of experience, her training company, LionSpeak, helps dental, veterinary, and discretionary health-care practices as well as corporate sales and executive teams achieve extraordinary results by communicating with greater clarity and inspiration.