

Converting Shoppers into Patients: A Prescription For Success

By: Nancy Hyman

Orthodontic marketing has developed into a sophisticated enterprise: advanced professional relations strategies, social networking, community involvement, etc. Your patient growth program may be driving potential patient calls, but are you confident with the conversion of caller-to-patient in your practice? I recommend four steps to ensure that each initial call results in an exam:

1. A new patient phone script followed for each prospective patient call
2. "Triage" of each call for appropriate scheduling
3. Scripting for "deal breaker" questions
4. Protocol for non-appointed and "no-show" initial exam callers

Step 1: Customize and laminate a new patient phone script.

Important aspects of the script are:

- Use the caller's name throughout the call.
- Ask two key questions: "How did you hear about us?" (track the source of the referral for monthly review) and "Is there anyone else in your family who would like to be seen?" (increasing the opportunity to add siblings/parents to the initial exam).
- Promote complimentary services: no-charge for exams, panoramic x-rays, digital photographs, etc.
- Confirm that the patient will discuss diagnosis and treatment options.
- Confirm that the patients can begin treatment on the day of the initial exam.
- Establish a "teaser" statement about your doctor/office.
- Establish concern and communicate that the patient has selected the right place to take care of their concern.
- Direct patients to the practice's website.

Step 2: Determine the "start quotient" (possibility of a signed fee agreement at the initial exam) of the potential patient.

Create a chart of 50 patient starts and common elements for each of those patient starts: sibling(s), insurance/no insurance, type of insurance, age, referring doctor's name, etc. For an example, patients twelve and over with insurance and a family member treated previously by the doctor will typically accept orthodontic treatment. Based on the compiled data during the initial phone call, the higher start quotient patients should receive premium appointment

"...the higher start quotient patients should receive premium appointment times."

times. Conversely, a seven-year old potential patient with no insurance is not scheduled for a late afternoon or Saturday exam appointment, since those times are reserved for higher quotient patients. If your practice is open on weekends or in the evenings, do not book new patient exams during this time if the parent/patient has orthodontic coverage but will not provide it. If your staff is unable to capture complete insurance information during the initial call (due to non-cooperation) the patient should not be allowed to schedule a premium appointment time.

Step 3: Script for difficult questions where a response may determine whether the caller commits to an appointment.

Scenario One: Invisalign

Caller: Do you offer Invisalign?

Front Office Team: We certainly do! Dr. James is a premier provider of Invisalign. May I book you a complimentary exam to discuss Invisalign with the doctor? The exam includes a panoramic x-ray and digital photographs at no charge.

Caller: I do not want to book an appointment today. I'm just calling for information.

Front Office Team: (If caller does not book) May I send you information about our office along with a special offer?

Scenario Two: Fees

Caller: How much do braces cost?

Front Office Team: The fee depends on the recommendations of Dr. James. I would be pleased to book a complimentary exam. A panoramic x-ray and digital photographs are included at no charge. Dr. James will recommend treatment options. You and your treatment coordinator will create a customized, interest-free payment plan. May I book an appointment for you? (If yes, proceed to the new patient script commencing with "How did you hear about us?")

Caller: I am just calling around for price information. I do not want to come in without knowing the fees.

Front Office Team: The fees are determined by the doctor's recommendations. In order to determine the patient fee the doctor must conduct an examination. The exam is complimentary and is a wonderful opportunity to meet the doctor. (If yes, proceed to the same new patient script commencing with "How did you hear about us?")

Caller: I do not want book an appointment at this time.

Front Office Team: No problem. May I send you information about our office along with a special offer?

Scenario Three: After School Appointments

Caller: Do you offer after school appointments?

Front Office Team: Yes we do! Occasionally a longer appointment will be available only during school hours but the

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majority of your child's appointments will be after school. In addition, Dr. James is a (*insert two technologies here*) provider—two technologies that will mean fewer appointments and shorter treatment time. Let's schedule a complimentary exam for your child. A panoramic x-ray and digital photographs are included. The one-hour appointment will give you plenty of time to discuss your child's optimum treatment plan with the doctors. (*You may want to reference the referral source: Dr. Smith refers many of his patients to us and I know he is very confident in our doctor.*) May I book a complimentary exam? (*If patient resists offer to send information.*)

Scenario Four: When Can I Come In? (for new patient exam)

Front Office Team: Our first available opening is (*date, time*). Let's schedule (*your/your child's*) complimentary exam, which includes an x-ray and digital photographs at no charge. (*Proceed to "May I have your name?" and "How did you hear about us?"*)

Step 4: Protocol for callers who do not book an appointment.

Ask the caller if you may send him/her an offer. An offer may be for complimentary services: exam, diagnostic x-rays, digital photograph, or special discount.

A sample letter from the treatment coordinator may include information below:

I wish to thank you for contacting our office regarding your orthodontic consultation. I am happy to personally answer any questions you have about our services.

*I can personally assure you that Dr. James is a highly skilled orthodontist. Her expertise coupled with her gentle touch is a captivating combination. Dr. James treats all of her patients the way she treats each member of her family. We pride ourselves on our unique practice philosophy and encourage you to browse our website at (*website address*).*

*I am proud of our office philosophy of (*insert technology/philosophy here*). Dr. James will answer your questions in an environment that is welcoming and calm. I have enclosed some special offers currently available in our office. Let's get started on the road to a lifetime of wonderful smiles! Call today to schedule your complimentary exam, including a panoramic x-ray and digital photographs at no charge.*

For callers who missed their initial exam appointment, I recommend a phone call within ten minutes of the missed appointment time. The treatment coordinator should call the person periodically and send the following letter:


We missed seeing you at your scheduled appointment, but we would like to take the opportunity to introduce ourselves. If your orthodontic needs have not been met, now is the time to give yourself a beautiful smile that lasts a lifetime.

From the thousands of "Dr. James' Smiles" that we have created, we know that this investment in your future makes a big difference by building self-confidence and self-esteem. Having treated many dentists' family members and staff, we are confident that you, too, will be happy with your beautiful smile and our office.

We look forward to seeing you soon; and, as a way of saying thank you in advance for choosing James Orthodontics consultation and panoramic x-ray, we've enclosed a gift certificate \$355 for you to use for those services.

Thank you again for allowing us the opportunity to have you as a patient.

(Please note: the \$355 offer is the value of the exam and diagnostic x-rays. It is not a discount on treatment.)

A proactive orthodontic team strives for an innovative approach to increasing patient referrals. Let your voice and your staff's hard work result in maximized production with a scripted set of protocols that result in converting callers to patients. The front office team and treatment coordinator working in concert are a practice's best asset. This ensures that all callers are fully aware of your practice's wonderful services, thus helping the potential patient make the best orthodontic care decision and creating value for your marketing dollar. 

Nancy Hyman is the founder of Ortho Referral Systems, which is dedicated to maximizing patient referrals and case acceptance with innovative, cost-effective solutions. Nancy has lectured nationally including at SureSmile, Ortho II, topsFest and Accutech Ortho Labs meetings. She is also the author of Winning Marketing Strategies workbook and Winning Treatment Coordinator Strategies. Nancy may be reached at nancy@hymanortho.com, 323-723-3535, or 323-308-9817.

BENTSON CLARK & COPPLE UPCOMING EVENTS

Resident Lecture:
Temple University
April 7, 2010

Resident Lecture:
Ohio State University
April 12, 2010

Exhibiting at:
AAO Annual Session
April 30 - May 4, 2010

Exhibiting at:
GORP
August 6-8, 2010

Presenting at:
OrthoVoice
September 16-18, 2010

