

## Maximizing Case Acceptance with a Creative Twist

Nancy Hyman, Founder of Ortho Referral Systems

**I**ncreasing case acceptance in these turbulent economic times requires an extra measure of creativity beyond the traditional tools of the trade. There are many challenges facing treatment coordinators today: job losses, increased competition, loss of insurance, price wars, dentists providing orthodontics in their office, and a general “wait-and-see” attitude by the consumer.

As a practice growth consultant and a team member in the office of Dr. William Hyman, I have had the opportunity to test several concepts that have proven effective in increasing case conversion percentages. With a few simple additions to your current protocol, I am confident that you will experience an increase in case acceptance. I have outlined three recommended strategies below:

### 1. Utilize a Patient Flow Sheet

Prior to the new patient or recall visit, the treatment coordinator (TC) will call each parent/adult patient personally to introduce himself or herself and confirm answers to the following information:

- Patient Referral Name (asked in initial call, confirmed in TC call)
- General Dentist (asked in initial call, confirmed in TC call)
- Most Recent Dental Exam
- Main Concern

If the patient indicated that he or she has insurance benefits but was unable to provide the information in the initial call, the TC will ask for the information. This will enable the TC or insurance specialist to determine the explanation of benefits prior to the consultation appointment.

The TC will then confirm the appointment time and review the directions to get to the office. The TC will also remind the parent/adult patient that if the doctor recommends treatment, “We can certainly get you (or child’s name) started at your consultation appointment” (i.e: complete records, sign fee agreement, book initial bonding appointment). Please note that in our office we call the initial exam or recall (observation) exam a consultation.

**"With a few simple additions to your current protocol...you will experience an increase in case acceptance."**

The TC will attempt to speak personally to each parent/adult patient during business hours. After hours, the TC can take the Patient Flow Sheet home to phone the responsible party. In our office, we provide a cell phone specifically for the TC to use for evening patient calls.

### 2. Create a Benefits Information Sheet

The TC will create a “benefits of choosing our office” sheet to discuss with the parent/adult patient. Introduce the subject with an acknowledgement that you understand the parent/adult patient is making the best decision, which may include concern about fees. The benefits sheet outlines the value of the orthodontic fee and acknowledges that potential patients may feel compelled to select an orthodontist based on price; however, the fees are often deceptive.

**"There are many challenges facing treatment coordinators today..."**

Below is outlined a sample introductory paragraph:

*Dr. Ortho is a second generation orthodontist with over 20 years of experience. He is certified for Clear Braces, Traditional Metal Braces, as well as Invisalign® and the Damon® System. Dr. Ortho and his team pride themselves in providing patient-first orthodontic treatment for children and adults. We understand that your hard-earned money is very important when making a decision as to which doctor you select for orthodontic treatment. We also realize that you have a choice and that you may be shopping around for the best deal. In doing so, please note that although it may seem like you are getting a lower price elsewhere, many of the services we include in our fee are additional at another office.*

Following the introductory paragraph, list all aspects of treatment included in the quoted fee. You may also want to include additional services offered: participation in community events, participation in insurance plans, complimentary internet access in waiting area, cooperation rewards, etc. Some of these may include:

- No charge for initial exam
- No charge for panoramic x-rays (before and during treatment)
- In house x-rays and records at no additional cost (when insurance allows)
- Family discounts (when insurance allows)
- Interest-free financing customized to your budget
- No charge for emergency appointments
- Early morning appointments (before school or work)
- Saturday hours
- Courtesy insurance claim filing
- No charge for your first retainer
- No charge for retainer checks for one year following your treatment

Continued on page 4



## Maximizing Case Acceptance with a Creative Twist

*Continued from page 3*

- No charge for each recall visit until you are ready to start treatment.
- Referral Rewards Program: earn gift cards for recommending friends and family to Dr. Ortho, booking your next recall appointment, participating in an office website testimonial, oral hygiene rewards, and many more options.

The TC presents a laminated copy of the benefits list to the responsible party and it is reviewed together. This may occur while waiting for the doctor or prior to the fee presentation. Insure that copies of this document are available for the potential patient to take home.

**"The key to success for your treatment coordinator is a well-planned approach..."**

### 3. Consults Not Started Protocol

If an initial exam or recall patient does not accept treatment, the following steps are recommended:


- 3 Days after Exam: The TC will make a phone call and send a letter.
- Second and Third Week after Exam: The TC will send a letter.
- 30 Days after Exam: The TC will make a phone call.
- 8 Weeks after Exam: The TC will mail a small monetary

gift card or discount coupon toward total treatment cost.

- 6 Months after Exam: The TC will send a slightly larger monetary gift card or discount coupon toward treatment as a Spring and Holiday mailing. Make sure to note that the gift cards are available for non-HMO patients only.

If a parent/patient establishes a financial issue (job loss, debt) during the first phone call, the TC will wait 3 months before continuing the follow up protocol.

The key to success for your treatment coordinator (TC) is a well-planned approach to the pre-exam phone call, an understanding on the parent/patient's behalf of the many benefits of choosing your office and the services provided in your fees, and a thorough follow-up when parents/patients do not accept treatment. In doing so, the TC will establish a strong relationship with the decision makers and you will be the first choice when the prospective patient is ready to start on the road to a lifetime of wonderful smiles.

*For a sample Protocol Worksheet, contact Nancy Hyman's office.* 

*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 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](mailto:nancy@hymanortho.com), 323-723-3535, or 323-308-9817.*

excerpt from: