Green light case presentation: Get a yes every time!

Introduction

Every practice can tap into the power of what I call Green Light Case Presentation, persuading patients to say ‘yes’ to recommended treatment is perhaps the greatest challenge faced by dentists. You can explain, discuss and inform all you want, but if you don’t motivate, you won’t be successful, especially when presenting cosmetic and elective treatment.

Good case presentation skills require understanding the patient’s point of view while articulating your own treatment philosophy. Without the willingness to take this empathetic view, it is nearly impossible to positively influence patient behaviour and treatment choices. Once dentists understand the point of view of people in the chair, doctors have a far better chance of relating to each patient. When this happens, chances are far greater of having an influence on choices that patients make. This is what Green Light Case Presentation is all about.

Keep in mind that patients interpret each new experience through their past experiences, beliefs and values. The best communicators understand this phenomenon and break down resistance by using education, compelling stories and testimonials to help patients understand the benefits of treatment within their unique frame of reference. Customising information to meet each specific patient’s viewpoint is the foundation of the finest case presentations.

True to their dental training, dentists tend to focus more on the disposition of patients than the clinical and technical features of cases. Patients, on the other hand, are far more concerned with lifestyle benefits. Therefore, the problem. When a presentation is heavily geared toward clinical aspects of treatment, patients will often lose interest. So don’t get detoured by the technical details — stay focused on the patient benefits and let Green Light Case Presentation work for you!

Green light essentials

Based on more than 25 years’ experience consulting to the dental industry, Levin Group has found that practices observing the following guidelines experience superior levels of case acceptance:

1. Educate the patient. Patients should be educated about all of the practice’s services, preferably during a hygiene visit. Typically viewed as nothing more than ‘cleaning’ by patients, the hygiene visit needs to be perceived as far more than that. Levin Group recommends calling this the ‘periodontal maintenance and oral cancer exam appointment.’ Typically, the hygienist has more time than the dentist does to educate patients who may need treatment.

2. Emphasise benefits. Patients will always want to know what the procedure will do for them. Remember that saying ‘yes’ to treatment is largely an emotional decision, particularly in elective treatment cases.

3. Be prepared for questions and objections. If patients are going to agree to spend time and money on services you recommend, they will understandably want to know more about certain aspects of treatment. Questions and objections should be anticipated, calmly answered and thoroughly explained.

4. Use targeted support materials. Educational materials, such as brochures, should be available to reinforce services discussed with the dental hygienist and/or the doctor. Along with being educational, this material should be developed with the target audience in mind.

5. Present financial options. Many cases are lost during the discussion of fees and payment methods. Offices that understand how to guide patients through several financial options have a much higher case acceptance rate than others. Levin Group recommends these options: 10 per cent reduction for full payment, half at the beginning and half before completion, credit cards and third-party financing.

6. Always follow up. Any patient who has been presented a case and does not schedule for treatment should receive a follow-up phone call from the front desk staff the next morning. Many patients are extremely interested in having treatment and just need a slight additional prompt. By having a front desk staff member call, you have a much greater opportunity of the patient following through on a decision to have treatment.

The Goal: trust

All of the preceding guidelines must serve one goal — gaining the trust of the patient. Without trust, getting the green light from patients is unlikely. Many dentists believe that all their patients have high levels of trust for the doctor and practice. Unfortunately, that confidence is conditional. Patients may find it easy to be confident in the restoration of a broken or decayed tooth, but that confidence does not necessarily extend to a larger case or elective treatment.

Keep in mind that patients have a specific vision of dentists as taking care of basic dental needs, not realising doctors are fully capable of providing larger or more comprehensive treatment as well. Since elective procedures still constitute only a small percentage of practice production, patients still view dentistry mainly as a need-based activity. Consequently, dentists must develop different styles of case presentation depending on the type of case being presented.

One recommendation is to schedule consultations during specific times of the day. Levin Group teaches scheduling as a system where consultations are placed in the mid-afternoon after most of the high-level treatment has already been completed for the day. This allows the doctor to focus completely on the patient in an atmosphere relaxed enough to spend the necessary time to present the case, answer questions and work through objections.

Summary

Green Light Case Presentation can help you get the case acceptance results you need to take your practice to the next level. Turn on the green light and transform your practice today!

Dr Roger P Levin is founder and chief executive officer of Levin Group Inc, a leading dental practice management consulting firm that provides a comprehensive suite of lifetime services to its clients and partners. Since 1985, Levin Group has embraced one single mission — to improve the lives of dentists. For more than 20 years, Levin Group has helped thousands of general dentists and specialists increase their satisfaction with practice dentistry. Levin Group may be reached at (888) 973-0000 and customerservice@levingroup.com.

Provide a new patient orientation pack

Provide patients with excellent customer service by creating a New Patient Orientation Pack. This pack should include:

1. Office policies/services: Describe your policies about appointments, emergencies and patient referrals. Provide a list of services offered.

2. Office philosophy: Outline your practice’s mission and vision.

3. Payment options: Describe financial alternatives and how your financial co-ordinator works with patients to provide a better understanding of their payment options.

4. Staff bios: Highlight the doctors’ and staff’s educational and professional backgrounds.

5. Welcome letter: Patients will appreciate a letter welcoming them to the practice.

— Roger P. Levin, DDS

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