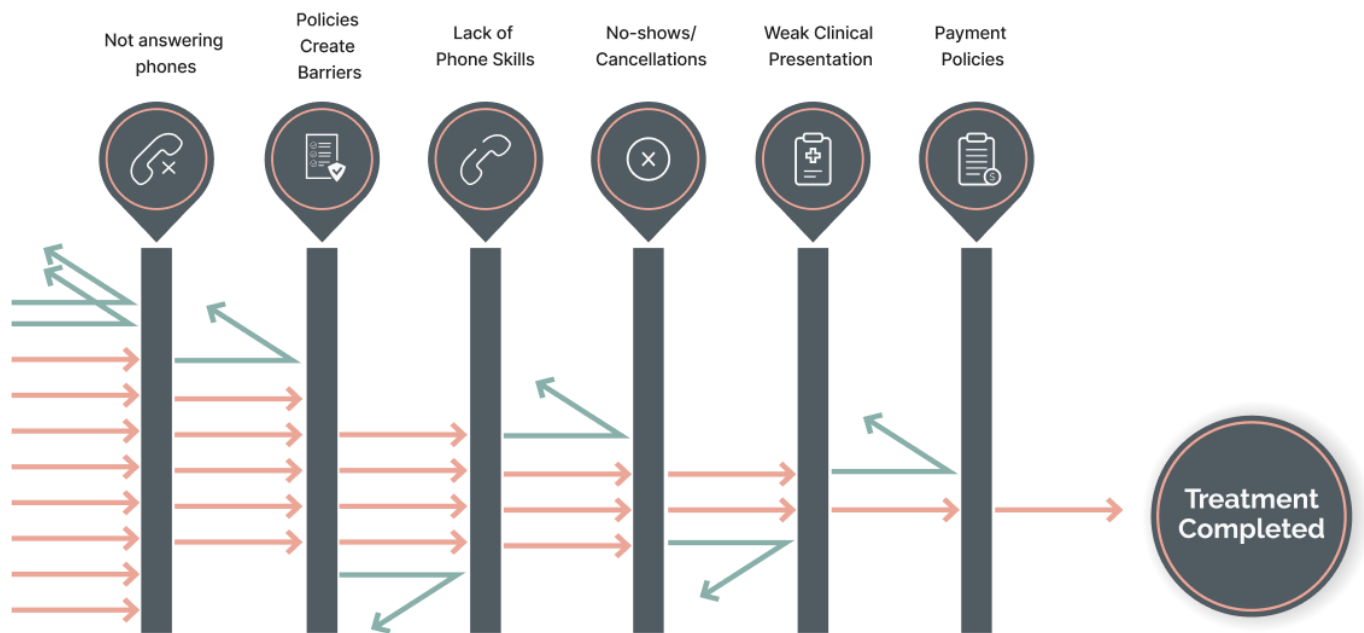


Phone Systems Training

Phones are the life blood of the dental practice. Everything we do to bring in new patients comes back to good phone skills. Without new patients, our practice will slowly die. The vast majority of patients first encounter with our business is through a patient phone call. **The average practice misses 38% of their calls. The average practice does not have a way to measure this.**

When we talk about new patient flow, most Doctors want to start talking about running ads and external campaigns. Mastering Phones is one of the most important skillsets you can train your team on and its also one of the most overlooked. It is incredibly important to get this right. When you don't get this right, you are literally wasting money on all of the marketing you invest in. Most small businesses don't dedicate time to training their team on this essential skill. Which means if you get this right, you will have an edge over all your competition.



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Ten Commandments of Phone Skills

1. Must answer phones from 8a-5p Monday-Friday *at a minimum*.
2. Remember the Core Six:
 - a. Name, DOB, Cell, Email, Referral Source, Who else can we schedule?
3. Whoever asks questions wins.
4. Smile when you Talk. Sound happy! Use their name.
5. Always Be Closing: Remember to Schedule the Appointment
6. Role Play is the ONLY way to learn
7. Use the New Patient Relationship Form
8. Immediately call back every missed call
9. Know your numbers. Track Missed Call % and NP Conversion %
10. Record calls and coach your team.

Bonus - Make Scheduling Easy

- Setup online chat widgets
- Setup online scheduling tools (such as Local Med)
- Take some phone calls yourself to better understand the process
- Make some phone calls out to other offices to see how poorly this is handled in other offices and how this is likely happening in your office too

Phone Call – Order of Answering

Utilizing an order of answering lets the team know when they are up to answer the phone and immediately helps streamline the process. This could look like:

1. Hygiene Coordinator
2. Treatment Coordinator
3. Insurance Coordinator
4. Operations Manager
5. Everyone in the office

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The Core Six

There are **SIX** critical pieces of information which **MUST** be gathered:

1. Name
2. Cell Phone
3. Date of birth
4. Email
5. Referral Source
6. Who else would like to schedule an appointment?

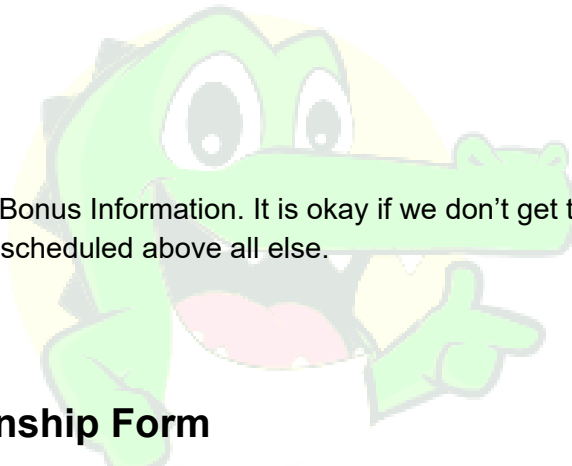
Bonus Information - Insurance

- Insurance company
- Policy holder
- Employer group
- Member ID
- Customer service #

The insurance information is Bonus Information. It is okay if we don't get this on the initial call. The goal is to get the patient scheduled above all else.

New Patient Relationship Form

- This is how we keep track of all information easily for our team members
- [New Patient Relationship Form](#)



New Patient Relationship Form

Smile... Ask... Smile...
ABC's Answer Me Cleaning

Team Initials: _____
Date/Time of call: _____

Thank you for calling [Office Name]! My name is (your name), who do I have the pleasure of speaking with today?
Okay (use name), how may I help you today? Answer and keep asking questions.

Phone # _____ DOB: _____
May I get your e-mail? _____

How did you hear about our office? _____

Regular Cleaning or Emergency Visit? Write any dental concerns or additional info here:

What time works best for you? Morning Lunch Afternoon Offer Two Appt Options
Scheduled: Date _____ Time _____ Same day cleaning Clause _____

Do you have any dental insurance savings that we can verify for you?

Subscriber: _____
Insurance Name: _____ State: _____
Employer/Group Name: _____ Group # _____
ID Number: _____ Provider # Number: _____

Who else should we schedule while we have you on the phone?

Relationship: Name: _____ DOB: _____
Relationship: Name: _____ DOB: _____

Alright, (patient's name) you will have your routine exam with the doctor, who will give you an update on your current oral health. Once we define what type of cleaning you may need, then our team will map out your next step. (Does that sound good?) If for any reason you need to change or cancel the appointment, will you promise me you'll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?
Thank you again for calling (patient name) and we look forward to seeing you. Have a wonderful day!

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Phone Call Basics

- Sound bubbly and happy. Smile when you talk!
- Answer question with a quick answer, and immediately follow up with your own question.
Never stop asking questions
 - “How did you hear about us?”
 - “To schedule your first appointment, I need to get some information from you. Is that okay?”
 - “Are you wanting to schedule a regular checkup or are you having some type of issue?”
 - “What works best for you... mornings, around lunch, or in the afternoon?”
- Always offer two appointments at a time... and fill today and tomorrow first.
- “Should we go ahead and schedule other family members?”

Ending the Call

- Repeat the appointment time.
- You will receive an email and text with some forms that would be helpful to fill out before you arrive.
- Reminder that we need to determine what type of cleaning you will need and we may not be able to complete your cleaning that day
- “If for any reason you need to change or cancel the appointment, WILL YOU promise me you’ll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?”

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New Patient - Cleaning and Check-up

Receptionist: Thank you for calling Sango Family Dental. My name is Amanda and yours is?

Patient: Hi, my name is Mary.

Receptionist: Awesome! Well, Mary, how can I help you?

Patient: Yes, Do you accept Cigna?

Receptionist: Yes we do, we accept all PPO plans. Do you have Cigna?

Patient: Yes, I do.

Receptionist: Perfect, we have a lot of patients with Cigna. When was the last time you were seen in our office?

Patient: This will be my first time going to your office.

Receptionist: Well let me be the first to welcome you! How did you hear about us?

Patient: I live in the neighborhood so I'm always driving by.

Receptionist: That's great! I'm glad you gave us a call today! To schedule your first visit with us, I will need to get some information from you. Is that OK?

Patient: Yes.

Receptionist: May I please have your: Last name, date of birth & Email

Patient: Gives all requested info.

Receptionist: Thank you for that information. Are you wanting to schedule a regular checkup appointment, or an emergency appointment?

Patient: A checkup appointment please.

Receptionist: What time of day will work best for this appointment: morning, around lunch, or afternoon?

Patient: I prefer mornings please.

Receptionist: What works best for you: This afternoon at 2:00pm, or tomorrow morning at 8:00am?

Patient: Tomorrow at 8:00 please.

Receptionist: And shall we go ahead and schedule other family members?

Patient: No, just me.

*Receptionist: Ok I have scheduled your appointment Ms. Jones for tomorrow, January 28th at 8am. You will have your **routine exam with the doctor**, who will give you an **update on your current oral health**.*

*Once we define what type of cleaning you may need, then our team **will map out your next step**. Does that sound good?*

If for any reason you need to change or cancel the appointment, WILL YOU promise me you'll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?"

Patient: Yes, I will.

Receptionist: Thank you. We have your appointment set. You will get a text from us reminding you of this appointment and with some easy forms to complete. We look forward to meeting you soon. Have a great day!

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Do you Take My Insurance? - Out of Network

- Answer question with an honest, direct answer. Immediately sell the office and why many patients come to you that have their same insurance:
 - “We do take your insurance, however, we are not an in-network provider. However, we have a many patients who have Metlife who come to see us. Let me tell you why!”
- Immediately go into what things set us apart:
 - Reviews
 - Rated number one
 - Locally owned
 - Caring dentists
 - Quality work
 - Best technology
- Never stop asking questions. “How did you hear about us?”
- “To schedule your first appointment, I need to get some information from you. Is that OK?”
- “Are you wanting to schedule a regular checkup & cleaning appointment, or are you having some type of issue?”
- “What works best for you... mornings, around lunch, or in the afternoon?”
- Always offer two appointments at a time... and fill today and tomorrow first.
- “Should we go ahead and schedule other family members?”
- Repeat the appointment time.
- “If for any reason you need to change or cancel the appointment, WILL YOU promise me you’ll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?”

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Emergency Call

- Sound very concerned about the problem they are experiencing, and ask lots of questions about it:
 - What tooth is bothering you?
 - How long has it been a problem?
 - How much pain are you in?
- “To schedule your first appointment, I need to get some information from you. Is that OK?”

Receptionist: Thank you for calling Sango Family Dental. This is Amanda, who do I have the pleasure of speaking with?

Patient: This is Debbie.

Receptionist: Hi Debbie! How can I help you today?

Patient: Yes, My back tooth broke and I need to get seen.

Receptionist: I am so sorry to hear that. Which area of the mouth did the tooth break?

Patient: It's the back one of the lower right.

Receptionist: How long has it been since it broke?

Patient: About a week now.

Receptionist: How much pain are you in?

Patient: It just hurts when I drink something cold.

Receptionist: It sounds terrible... but our dentist will take great care of you. When was the last time you were seen in our office?

Patient: This will be my first time going to your office.

Receptionist: Well let me be the first to welcome you. How did you hear about us?

Patient: I live in the neighborhood so I'm always driving by.

Receptionist: That's great! I'm glad you gave us a call today! To schedule your first visit with us, I will need to get some information from you. Is that OK?

Patient: Yes.

Receptionist: May I please have your: Name, DOB, Cell Phone, Email

Patient: Provides information.

Receptionist: Will you be using your dental insurance?

Patient: Yes.

Receptionist: May I please have your:

Insurance company, Employer group, Member ID.

Patient: Gives all requested info.

Receptionist: Let's get you in as soon as possible with our dentist.

What works best for you: This afternoon at 2:00pm, or tomorrow morning at 8:00am?

Patient: Tomorrow at 8:00 please.

Receptionist: And shall we go ahead and schedule other family members?

Patient: No, just me.

Receptionist: Ok I have scheduled your appointment Ms. Jones for tomorrow, December 12th at 8am. You will get a text from us reminding you of this appointment. We look forward to meeting you soon. Have a great day!

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Cancellation Call - Less than 48 hour Notice

- Sounds very disappointed that the patient is cancelling.
- Plead with the patient and try to get them to keep the appointment time. Make it hard to cancel:
 - “Oh no! The doctor will be sad to hear this. We reserved that time JUST for you. Is there any way you can still make it?”
- If the patient must cancel, then immediately reschedule without skipping a beat or asking them if they want to:
 - “I’ll help you reschedule it right now. Would another time today work for you or should we look at another day this week?”

Receptionist: Thank you for calling Sango Family Dental. This is Mary, how may I help you?

Patient: Yes, I won’t be able to make my appointment today. I had something come up.

Receptionist: Oh Noooo! The doctor will be sad to hear this. We reserved that time JUST for you! Is there any way you can still make it?

Patient: No, I can’t.

Receptionist: OK. I’ll help you reschedule it right now. Would another time today work for you, or should we look at another day this week?

Patient: Do you have anything available Friday?

Receptionist: What works best for you: This Friday at 10:00am or 1:30pm?

Patient: Friday at 10am will be perfect.

Receptionist: Ok I have scheduled your appointment Ms. Fernandez for this Friday, December 12th at 10am. If for any reason you need to change or cancel the appointment, WILL YOU promise me you’ll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?”

Patient: Yes I will.

Receptionist: Thank you. We have your appointment set. You will get a text from us reminding you of this appointment. We look forward to meeting you soon. Have a great day!

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Price Shoppers

- Answer pricing question with a price range, and immediately follow up with your own question.
- Never stop asking questions. "How did you hear about us?"
 - "When was the last time you were seen in our office?"
 - "To schedule your first appointment, I need to get some information from you. Is that OK?"
 - Name, date of birth, cell phone, email
- "Are you wanting to schedule a regular checkup & cleaning appointment, or an emergency appointment to get that tooth looked at?"
- "What works best for you... mornings, around lunch, or in the afternoon?"
- Always offer two appointments at a time... and fill today and tomorrow first.
- "Should we go ahead and schedule other family members?"
- Repeat the appointment time.
- "If for any reason you need to change or cancel the appointment, WILL YOU promise me you'll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?"

Receptionist: Thank you for calling Sango Family Dental. This is Amanda, how may I help you?

Patient: Yes, how much do you guys charge to get a tooth pulled?

Receptionist: Depending on what type of extraction you need, costs range from \$63 to \$309.

Do you need to have a tooth pulled?

Patient: Yes, I do.

Receptionist: Okay, well good news our Doctors are amazing and do everything possible to keep you comfortable, especially when having a tooth pulled. When was the last time you were seen in our office?

Patient: This will be my first time going to your office.

Receptionist: Well let me be the first to welcome you. How did you hear about us?

Patient: I live in the neighborhood so I'm always driving by.

Receptionist: That's great! I'm glad you gave us a call today! To schedule your first visit with us, I will need to get some information from you. Is that OK?

Patient: Yes.

Receptionist: May I please have your: Name, Date of birth, Cell phone, Email

Patient: Gives all requested info.

Receptionist: Thank you for that information. Are you wanting to schedule a regular checkup and cleaning or is this an emergency?

Patient: I just want to get that tooth looked at.

Receptionist: Okay, got it. What time of day will work best for this appointment: morning, around lunch, or afternoon?

Patient: I prefer mornings please.

Receptionist: What works best for you: This afternoon at 2:00pm, or tomorrow morning at 8:00am?

Patient: Tomorrow at 8:00 please.

Receptionist: And shall we go ahead and schedule other family members?

Patient: No, just me.

Receptionist: Ok I have scheduled your appointment Ms. Fernandez for tomorrow, December 12th at 8am.

If for any reason you need to change or cancel the appointment, WILL YOU promise me you'll give me a call at least 2 days prior to the appointment so we may release the time you have reserved to another patient?"

Patient: Yes I will.

Receptionist: Thank you. We have your appointment set. You will get a text from us reminding you of this appointment. We look forward to meeting you soon. Have a great day!

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Confirmation Verbiage

Do not say: "Hi this is Teresa and I'm calling to confirm your appointment tomorrow"

Instead use this:

"Mrs. Jones, I am calling about your 8am appointment tomorrow with Dr. Jones. I wanted to let you know that we have everything set and ready for your appointment and we look forward to seeing you shortly before 8am tomorrow."

Patient Calls and Wants to Transfer Doctors due to being Out-of-Network

"Oh no, we are so sorry to hear that!"

"While we would like to do everything possible to serve the needs of our patients, we have decided to not be a participating provider with certain insurances because the financial reimbursement is so low that it doesn't allow us to provide you the best care possible. We have decided to not cut corners and only offer the quality of care that we would provide our family."

Would you like to know the reason many Metlife patients continue to see us?

1. Quality of care - our doctors use the best technology and have many additional hours of continuing education.
2. Improved customer service
3. Honest, ethical feedback from a locally-owned dental practice.

We completely understand if cost is the primary factor reason for your selection of dentist.

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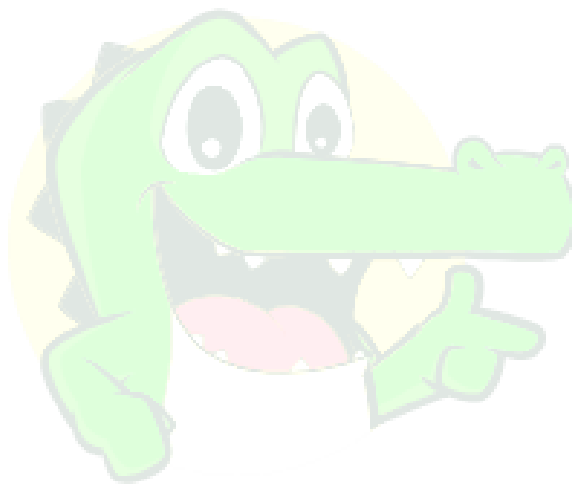
Do you take Medicaid (or my HMO)?

Answer question with an honest, direct answer. Immediately sell the office and why many patients have chosen your office even with Medicaid. Promote your in-house membership plan.

“We don’t currently take Medicaid but we have a lot of patients that come to us with Medicaid because we have in-house membership plan that makes dentistry really affordable. Do you currently have an emergency and just needing a check-up?”

Never stop asking questions.

“How did you hear about us?”



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