

5 *sure-fire* ways you can set up the assistant for success in the planning appointment -

1. **Handoff** – Don't forget to take a couple of minutes to handoff to the assistant at the beginning of the planning appointment. If you're scheduling properly, this can happen without interruption with your afternoon re-care patients.
2. **Be certain that your patients leave with photos** (don't forget the 'after'/comparison photos) – you are setting your assistant up for failure without them.
3. **Give your patient something to with the photos** – remind them that their input is valued and will be taken into account when they come back to meet with the assistant and doctor.
4. **Give the patient heads up about how the planning appointment will be structured** so that they understand why they are meeting with the assistant first. *'Mrs. Jones, when you come back on Tuesday, you'll meet with Kim, Dr. Brady's amazing assistant before he completes your exam. She will go over your pictures with you one last time, to be sure we have taken everything into account that is important to you. She'll help you with any challenges you might foresee, and work with you to establish a timeframe'.*
5. **Schedule the planning appointment no longer than a week out** – schedule first thing right after lunch, ask your scheduling coordinator to be sure planning appointments are blocked, with nothing else scheduled on the doctors schedule. By doing this in the hygiene room, you ensure the patients' participation.