



Sale **before** the Exam?

There is no doubt a greater chance that you will fill your doctor's schedule when you diagnose dentistry. But we also know that you have the opportunity to diagnose more long-term, comprehensive dentistry for your patients when you give them ownership. And we also know that the best way to give patients ownership is through photos and the planning appointment process.

So... How do we invite the patient back for a planning appt?

The exam takes place at the planning appointment. It's the very last thing we do, after we know what end-result the patient is seeking, what motivates them, what obstacles they foresee, etc. The first visit is simply an information-gathering session. *No solutions, no exam.*

Traditionally it's fallen under the responsibility of the hygienist to invite the patients back for the planning appointment – but as many of you have discovered, you can begin planting seeds for the planning appointment as soon as the phone call. In fact, every role in the office can influence case acceptance of comprehensive dentistry by guiding patients toward the planning appointment process.

FRONT OFFICE TEAM -

Step One - Establish long term goals

Other than a cleaning, what else would you like to accomplish when we see you?

What's most important to you when you think about your teeth?

How proactive would you like to be when it comes to your teeth?

Step Two - Acknowledge patient values and goals

'Mrs. Jones, I know we can help you accomplish your goals. I also know that you're very busy/concerned about the finances/having some anxiety (insert their hot button here) –

I know we haven't had the opportunity to take a look in your mouth yet, but based on what you've shared thus far about the things that are important to you, I know we can help you!

I know you want to get your teeth cleaned... Would you mind if we also took some photos and x-rays? These are wonderful diagnostic tools that will help you accomplish what's most important to you.

Step Three - Connect the dots from what's important to the patient to the planning appointment - it's seen as part of the process to accomplish what they want.

We'll certainly make the most of your time today and stick to the time allotted so that you can get back to work. Would it be helpful if we could sit down in a couple of days to come up with plan that will save you visits/time/money in the future?

I know you're busy - we will make a point to start on time, without any interruptions. You'll leave with a solid plan that will save you time/money/injections (insert objection here) long term and I know that's important to you. We'll even waive any additional fees – how does that sound?

ASSISTANT LIMITED EXAM –

Mrs. Jones, I'm so sorry you're dealing with a broken tooth unexpectedly. I'm sure it wasn't very convenient to have to leave work to come to the dentist!

Step One - Establish long term goals

We are certainly going to take care of this tooth for you. Tell me about the rest of your teeth...

Would you like for us to take a look to be sure you don't end up in this situation again?

What if could help you avoid emergencies altogether?

Step Two - Acknowledge patient values and goals

You're in the right place! We can definitely support your goal to be proactive and catch things early. Would you mind if we also took some photos and additional x-rays today? These are wonderful diagnostic tools that will help you accomplish what's most important to you, and will save you a visit.

I also know that you're very busy/concerned about the finances/having some anxiety (insert their hot button here) –

Step Three - Connect the dots from what's important to the patient to the planning appointment - it's seen as part of the process to accomplish what they want.

Based on what you've shared, I know we can help. Would you be willing to visit with Doc in a couple of days for a short time to come up with a plan? We'll be able to save you time/money/injections (insert objection here) long term and I know that's important to you.

How about Tuesday at 1 pm? I'll bet I can even talk him into not

charging you – it will be a continuation of today's visit. We'd love for you to take home these photos we took today and spend some time marking on them – things you like, don't like, questions, etc. Dr. Brady will be relying on your input quite a bit as you two work together to come up with the plan to be sure you don't have to deal with unexpected trips to the dentist. How does that sound?'

Assistant – New Patient Consultation

Assuming goals are established through interview, then built upon as the assistant takes over, we would then say,

'Mrs. Jones, you've come to the right place! I know we can help you accomplish what you want for your teeth. Rather than shooting from the hip today, would it be alright if we set up a time for you and dr. to come up with a plan?'

We want to be sure and make the best use of your time. By taking a couple of days for both you and Dr. to do some 'homework', I'm confident we'll be able to save you both time and resources down the road.

How about Tuesday at 1 pm? We'd love for you to take home these photos we took today and spend some time marking on them – things you like, don't like, questions, etc. Dr. Brady will be relying on your input quite a bit as you two work together to come up with the plan to help you accomplish exactly what you want. How does that sound?'

Hygienist - new OR existing patient with potential for treatment

'Mrs. Jones, I know we can help you accomplish your goals. I also know that you're very busy/concerned about the finances/having some anxiety (insert their hot button here) -

Based on the things you've shared with me today, I'll bet I can talk Dr. into meeting one on one with you to come up with a great plan. We'll be able to save you time/money/injections (insert objection here) long term and I know that's important to you.

How about Tuesday at 1 pm? I'll make sure we don't charge you for the follow up – it will be a continuation of today's visit.

We'd love for you to take home these photos we took today and spend some time marking on them – things you like, don't like, questions, etc. Dr. Brady will be relying on your input quite a bit as you two work together to come up with the plan when you come in on Tuesday. How does that sound?'