

# CREATING A “6” STAR EXPERIENCE

## ACTIONABLE STEPS

### 1 THE INITIAL PHONE CALL

- **“Active Listening”** Fully concentrate, listen to understand, and confirm what you heard.
- **“Be Engaged”** Use an up tone voice, pause and remember not to rush. Remember your patients name and the information provided.
- **“Make Scheduling Easy”** Consider what questions you need to ask in order to do this? Avoid offering multiple times, offer morning or afternoon.
- **“Gather Information”** Decide what information is important to make the process seamless.
- Document your patients concerns using the appointment block in your dental software.
- Gather the proper insurance information. Obtain their breakdown/eligibility prior to their visit.
- Ask the patient to fill out the paperwork prior to their appointment.

- **VERBIAGE:** “In order to respect your time and be efficient, we ask if you could please fill out the forms prior to your appointment.”
- Ensure you have a proper confirmation sequence in place. What does your current system look like?

#### ➤ **SUGGESTION:**

1 Month in advance- Send an email reminder  
1 Week in advance- Send a text  
2 Days in advance- Send a text/Call if they haven't confirmed via text  
How will you handle patients who don't confirm?

**Suggestion:** If your patient doesn't respond within 24 hours, consider how you want to handle their appointment. You may want to move it aside to open room for an emergency.

- Welcome new patients to the practice!  
Reach out the day before. “Hi, I'm \_\_, I wanted to reach out to welcome you to our practice. I look forward to seeing you tomorrow at \_\_ time. Do you have any questions regarding where the practice is located?”

## 2 DAY OF THE VISIT:

### › VIEW THINGS FROM YOUR PATIENT’S PERSPECTIVE

Is the office clean?  
Is the front desk organized?  
What is the body language like of the person sitting at the front?  
Greet your patient’s with an up tone voice.

### › STOP LABELING YOUR PATIENTS

Often times we judge patients before knowing their story. Maybe they are irritating or aren’t friendly.  
Everyone has a different story outside the office. Let’s make their experience more than just a “Dental Appointment.”

### › EXPECT YOUR PATIENT

Know their **preferred name** and date of birth.  
Why is this important? You might have two patients by the name of John walking in, or a new patient you never met. Determine who is walking through the door based on their age.  
Stand and warmly greet your patient.  
“John? Nice to meet you! I talked to you over the phone. We are happy to have you here. We have hand sanitizer if you would like to use some and our bathroom is \_\_\_ if you need to use it in the future.

### › SET YOUR ARRIVAL INDICATOR IMMEDIATELY AND PAY ATTENTION TO THE TIME.

WE MUST SEE PATIENTS ON TIME.

If we happen to run over and are not on time.  
We need to express with compassion

“Mrs. Jones, we are running a bit behind, doctor is seeing an emergency patient. Your time is super valuable, we will get you back as soon as possible.

THANK YOU so much for being patient.

(Consider gift cards on hand in case the patient is waiting longer than 10–15 minutes)

## 3 THE 1<sup>ST</sup> HANDOFF

Call the patient by their preferred name, introduce yourself, walk aside the patient or behind them. Direct them to their operatory. Do not walk out with paperwork or a medical history to call your patients back. Have a conversation with them as you are walking.

## 4 IN THE CHAIR:

- › Bring your patient back ON TIME!
- › Greet the patient by their name with a smile (smiling eyes while wearing a mask) & warm demeanor.
- › If you are seeing a child, ask if the parent would like to come back with them and if so, get them a chair.
- › Instruct the patient on where to place their personal items.
- › Practice active listening when the patient is talking – Your goal is to figure out who the patient is, and their personality style. In order to better connect with them and understand their expectations.
- › Be sure to document a personal note. Refer to it during their next visit. Continue to build a connection with your patient.
- › Speak confidently and in a calming tone.
- › Thoroughly explain today’s treatment.
- › Be sure your patient is aware of the length of today’s appointment. Ask if there is a certain time they need to leave by.
- › Ring for the Dr(s) when your patient is ready. After the doctor has greeted the patient, the assistant is to tell the doctor what they discussed with the patient to minimize repetition. If there is going to be a wait for the doctor. Inform your patient and thank them for their patience.

- › Be aware if your patient is phobic, this is part of knowing the patient. If they are fearful of noise, offer headphones. If they are fearful of needles, hide the syringe on table until needed. Try to gauge what they are fearful of and minimize it. Ask your patient if they want to know all of the steps as they are being done. Some patients may prefer not knowing and enjoy silence.
- › Check on the patient’s comfort throughout the visit. Check their headrest, offer Chapstick/lip moisturizer, or a blanket if they are cold.
- › Review future treatment needed and ensure they know what to expect.
- › After treatment, ensure their ledger, route slip, and clinical note coincide. The goal is to make sure they have a seamless experience at check-out.
- › If the patient requires a specialist visit, ask if they would like us to schedule it for them.

### › THE 2ND HANDOFF

- › Fill out the route slip prior to walking the patient up front, walk aside of them if possible. If it’s not possible due to space walk behind them.
- › Stand aside of them at the front desk, ask “Do you have any other questions for me?” Pass the route slip to the front desk check out.

# 5

## PATIENT EXIT

### WHAT ARE CRITICAL THINGS THAT NEED TO HAPPEN BEFORE THE PATIENT LEAVES. (FOR EVERY PATIENT)

- › Clear understanding of treatment IE. Signed treatment plan.
- › Personal connection/Note we can reference in the future.
- › Next scheduled appointment.
- › Offer to schedule any overdue family members.
- › Clear understanding of their financial obligation.
- › Collect payment for services rendered today.

# 6

## RETENTION:

- › What does our follow up system look like? How often should we follow up with patients who don’t schedule treatment?  
Recommendation: 1 week/1 month/3 months

### ADDITIONAL TOUCH POINTS TO CONSIDER:

- › Continue to build a relationship with your patients. Through birthday/wedding cards, consider filling out the cards as a team during your morning huddle.
- › Lead your patient to write you a review by supporting each other.

### EXAMPLES:

**Admin:** “How was your visit today? Awesome... do you know what Dr. \_\_\_ would love, if you could write him/her a google or yelp review. We talk about them in our team meetings, I will send you a link!