

ACTdental



New Patient Call: Success Strategies

The Why:

The phone is a powerful tool in the dental office! A successful new patient phone call is crucial for a dental practice's success. It sets the tone for patient trust and loyalty. Empathetic and efficient communication during this call is essential. It not only secures appointments but more importantly shapes the patient's perception of the practice.

A poorly handled call risks losing patients and damaging the practice's reputation. Prioritizing excellence in phone interactions is key to thriving in the healthcare landscape.

This New Patient Call:

Success Strategies resource will help guide you to creating highly impactful relationship-building calls in your practice.

5 Success Strategies for Impactful New Patient Calls:

1 Gracious Greeting

- › First impressions matter! Having a warm and welcoming greeting goes a long way. Consider having intentional verbiage for answering the phone that includes the practice name, your name and expresses gratitude to the caller.
- › *"Thank you for calling Dr. Awesome's Dental Practice, my name is Team Member, how may I help you today?"*

2 Discover the Objective

- › The most important information to gather from a potential patient on a new patient call is a thorough understanding of their primary concern or objective. Every potential patient who calls has something that motivated them to pick up the phone. Your goal is to discover that motivation!
- › Be curious and ask open-ended questions!
- › *"What are you looking for in a new dental home?"*
- › *"Whom may we thank for sending you our way?"*

3 Affirm the Caller

- › Once you understand the potential patient's concerns and motivations, you can accelerate their trust in the practice by affirming they are calling the right place. Share with them how you can meet their needs, what differentiates your practice from others and perhaps a story of other patients who have been in their shoes.
- › Focus on value while confidently answering their questions about investments of time and money.

4 Strategic Scheduling

- › Guiding potential patients to the most appropriate new patient path is an integral part of the new patient call. It's as simple as asking, *"What are your expectations of your first visit with us?"*
- › Once the path is clear, you can focus on reserving time and summarizing the details of the reserved visit. It's important to repeat the reserved date, time and length of time multiple times before ending the call.
- › **Most importantly**—Ask them to schedule! (*Bonus question: "What other family members can I help you reserve appointments for today?"*)

5 Deliver the WOW Factor!

- › Potential patients are often calling multiple offices before making a decision, so it is critical that you WOW them with their new patient call experience to stand out!
- › Use the 3 A's of active listening throughout the call
 - › **Attention:** Give the caller your full and focused attention
 - › **Attitude:** Maintain an optimistic and positive attitude
 - › **Adapt:** Shift gears as needed to meet the needs of the caller

LOGISTICS COME LAST!

- › While details hold significance, there's a tendency to rush into logistics prematurely. While logistics such as the date of their last dental visit and xrays are undeniably important, they pale in comparison to the significance of investing time in understanding the patient.

WHAT ABOUT INSURANCE?

- › Patients naturally inquire about their insurance benefits, and it's an opportunity to demonstrate confidence in managing such queries. Emphasizing your practice is insurance-friendly and dedicated to supporting patients in leveraging their benefits to the fullest extent adds a positive touch. Additionally, assuring transparency regarding financial expectations fosters trust and reassurance among patients.

NEW PATIENT INTAKE FORM

- › Highlight the significance of your new patient call to the entire team by introducing a new patient intake form. Print this form on vibrant, eye-catching paper to underscore its importance, and let it serve as a roadmap for your call. Utilizing paper for note-taking can enhance your engagement during the conversation while also signaling—Do Not Disturb!

PATIENT NAME:

CELL PHONE:

DATE OF CALL:

DISC

APPT DATE

New Patient Call Sheet



Who may we thank for referring you?

What is the most important thing to you'd like us to address during your visit?

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>

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TO HELP DISCERN WHAT TYPE OF APPOINTMENT TO RESERVE WITH YOU, WHAT ARE YOUR EXPECTATIONS FOR YOUR FIRST VISIT WITH US?

Verbiage for a new patient appointment...

- > We reserve (length of time) for your first visit with us, this visit starts with (describe what the NP visit entails)
- > To provide the most thorough evaluation of your health, we will check the areas we cannot see clinically with (add in what x-rays, scans, photos etc as you see fit for your practice) so you can see what we see.
- > Our hygiene team will assess your gum and bone health and determine if preventative hygiene services are appropriate.
- > Lastly, our doctor will perform an oral cancer screening, evaluate your teeth, joints, and muscles through a comprehensive exam and discuss with you his/her findings and any concerns you may have.
- > We ask that you be prepared for the full investment of \$ _____ for this visit..

> Will you be receiving assistance from an insurance company? Yes No

Primary Insurance Insurance Phone #

Subscriber Subscriber DOB Zip Code

Employer Group # Subscriber ID/SS#

We will verify your plan eligibility and any x-rays you send us for diagnostic quality prior to your visit so that we can be best prepared for what assistance or limitations your insurance may provide.

With your permission I will gather some information prior to scheduling...

Birthdate: E-Mail:

When was your last dental hygiene visit?

Last x-rays?

We would appreciate it if you could have your most recent x-rays e-mailed to us at (email).

We will be sending you new patient forms electronically, those can be completed and submitted to us directly, if for any reason that is not feasible, please arrive 20 min before your appointment to complete them in our office.

Insurance verified: (initials)

Estimate provided to patient for initial visit \$