Increase starts with first call

By Scarlett Thomas

T he initial phone call is one of the most vital parts of an orthodontic practice. If the new patient phone call is handled properly, the potential new patient will have a positive outlook regarding the practice, often resulting in an increase in case acceptance.

I recommend all new patient phone calls be handled in the same manner. The format and guidelines should be identical, and the scripting should be memorized. One of the ultimate goals should be to educate, motivate and excite the new patient about the practice.

Creating a flow sheet will generate a guideline for staff members learning the process of new patient phone calls. Frequently, staff members forget to ask vital questions, which results in a lack of collecting needed information. Visuals for staff members to look at while speaking on the phone will help them in proper scripting.

After the basic information is gathered, the new patients should be asked, “Whom may we thank for referring you?” When the answer is given, something positive should always be said regarding that individual. In addition, new patients should be asked if that individual has had the opportunity to inform them about the doctor.

At this point, take the opportunity to inform the new patients over the phone about the doctor’s background. I recommend choosing three bullets about the doctor.

• Dr. Smith has been practicing orthodontics for more than 18 years.
• He is board certified.
• He practices using the most advanced technology available.

Promoting the doctor over the phone builds confidence and excitement about the doctor and sets your office apart from competitors.

It’s also important to ask, “Are there any medical concerns the office should be aware of?” Often, patients are allergic to latex gloves, have a heart murmur or may be handicapped. Knowing this information ahead of time will allow for a better experience.

Another key question is asking whom the new patients’ general dentist is and when was their last cleaning and/or checkup. I also recommend asking if they are aware of the referring dentist’s main concern and if they have any additional concerns of their own. These questions will help prepare the treatment coordinator in advance concerning any obstacles he or she may have in starting to treat the patients.

Most importantly, new patients should be offered the opportunity to have insurance verified prior to being seen. Doing this will allow the treatment coordinator the opportunity to properly address financial concerns while presenting fees.

When asking for the new patients’ insurance information, it should be asked in a manner to convey you are providing them with excellent customer service. “Is there any insurance we may check on for you?” You should not say, “Do you have any insurance?”

Furthermore, it’s important to ask new patients, “Are there any additional family members you would like us to see?” Often, the answer to this question is similar: “I have another son who is only 7 years old — is he too young to start?” Or, “I’ve often thought about braces for myself, but I’m too old.” This question gives the perfect opportunity to further educate patients about reasons for early evaluation along with advancements in orthodontic care for adults. Consistently asking this one question will increase your overall new patient exams without any additional marketing efforts.

For a limited time only, Orthodontic Management Solutions is offering a complementary recorded spy call of your practice’s initial phone call process. Call our office and mention this article in Ortho Tribune.

To learn more about initial phone calls, increasing case acceptance, building a successful schedule and/or marketing, Orthodontic Management Solutions invites you to attend its workshop in San Diego, Sept. 19–20. Visit orthoii.com for more information.

About the author
Scarlett Thomas is an orthodontic practice consultant who has been in the field for more than 25 years, specializing in case acceptance, team building, office management and marketing. As a speaker and practice consultant, she has an exceptional talent to inform, motivate and excite.