

# Take Action: Treatment Coordination for a Successful Dental Practice



Thoughtful patient engagement from the initial phone call through the exam, consistent processes for case conversion, and excellent patient care resulting in patient referrals are the hallmarks of a successful treatment coordination process.

Your delivery of patient care, including excellent team performance and finesse with financial systems, will create a loyal patient eager to refer more patients. Engage, convert, and deliver treatment coordination excellence to produce practice success.

## ENGAGEMENT

Prospecting turns strangers into friends, visitors into patients. Whether you're answering the phone or conducting the new patient exam, the excellence of your service operations and the performance of your winning team will influence your new patient to start treatment. Doctor confidence and soft skills will further motivate you to take action by advocating your dentistry and leading the patient to begin care. Your influence is measured when you ask the question "Would you like to get started?"

## CONVERSION

Focus on what you can do now to get your new patient started today. Ask questions to build your relationship. Show the new patient how they can afford dental care and work out acceptable financial arrangements. Doctors have the opportunity to take out the middle man and prompt the patient to start treatment while removing start barriers. Never give up on a missed exam or an unscheduled patient. Realize that with consistency of follow-up, most exams will schedule. Ask questions to eliminate patient roadblocks and excuses. Track your numbers for continued progress.

## DELIVERY

Motivate and focus your team through consistently tracking key performance indicators. Delivery of services includes payment. Your collections process success will be based on consistency. Your operating discipline and inventory control will determine your practice success and profitability. Set priorities to improve treatment coordination processes. When you have happy patients in the office, ask for referrals. Monitor and improve practice metrics on a daily, weekly, and monthly basis to achieve treatment coordination goals and success.

## LEARNING OBJECTIVES:

- Fine-tune the steps to an effective new patient conversion process
- Illuminate the elements of influence and how they apply to the new patient exam
- Explore patient excuses for not starting treatment and learn how to remove start barriers
- Learn to importance of multiple forms of patient follow-up
- Review effective collections techniques for minimizing accounts receivable
- Analyze key metric reports and understand their meaning
- Identify weekly team performance indicators to maximize engagement and performance

## Suggested Audience:

Dentists and  
Team Members

## Suggested Format:

Full or Half Day;  
Workshop; Keynote

*"Phenomenal speaker. Very real world info." -Attendee, WRDE 2019*

**Get your copy of Take Action: Treatment Coordination  
for a Successful Dental Practice here!**



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