



A five star experience: part three

Ashish Parmar looks at the importance of the case presentation meeting in making patients feel secure and satisfied with their treatment

In this final of my three articles, I will be discussing the way a dentist and treatment co-ordinator (TCO) should interact and carry out the case presentation. This is the appointment when the patient returns to the practice to find out what the dentist recommends regarding dental care.

Getting started

Before the patient arrives, it is necessary for the TCO to have the consultation room clean and ready for the consultation. All relevant paperwork and models, photographs and PowerPoint (or equivalent slideshow presentation) should be ready.

I strongly recommend a separate,

dedicated room called the consultation room to welcome new patients for the initial interview and also the case presentation appointments. This is in a non-clinical setting that will make the patient feel more at ease.

The dentist and TCO should also review everything beforehand – such as the way to present to the patient, dental fees, financing, and so on.

When the patient arrives, they should be welcomed and offered a drink. They should also ideally be accompanied by the decision maker, if the patient themselves will not be paying for the treatment.

There are some 'golden rules' about how a dentist should do a case presentation:

- Be positive. Give the patient hope

(no matter how severe their dental problems)

- Tailor the presentation to the personality type (see box opposite 'Personality and the DISC system')
- Repeat the patient's wants and goals first
- Keep it simple – avoid technical jargon and keep dental terms to a minimum
- Present in an order of priority that is important to the patient
- Involve the patient by asking questions
- Explain the benefits of having any recommended dental treatment. This is what will appeal to the patient, rather than all the technical details (which dentists generally love talking about).

The consultation

The dentist's introductory statement could go along these lines: 'Sarah, I have had a chance to review your records and I have come up with the ideal treatment plan for you.'

'From my understanding last time, your main goals were ABC. Is that correct?'

'Now, how much information would you like to know?'

This last question is very important, as it identifies what level of detail the patient wants regarding explanations. Some patients, such as the 'dominant' character will like short, sharp presentations, whereas someone who is a 'cautious' character may need a much longer appointment as they will want to know all the details.

During the consultation (and using the patients photographs in a PowerPoint), you should:

- Review the patient's main goals
- Discuss the gum condition and advise on the required periodontal treatment
- Review the jaw joint condition and the bite/occlusion
- Explain the condition of the teeth and the restorations
- Discuss the cosmetic concerns and suggest treatment solutions
- Consider all the alternative treatment options.

Once the dentist is sure that the patient has clearly understood all the clinical aspects of the treatment, and made a decision on which option he or she has chosen, then the financial matters should be discussed.

Before this occurs, the patient should be given the opportunity to ask further questions to clarify anything that is worrying them. It is important to deal with these issues or objections at this early stage. The dentist should then also review all the risk factors of the treatment to get the final informed consent.

The dentist can then either present the total fee, or use a finance calculator grid (such as the one from Medenta) to explain how the treatment can be made more affordable by considering financing and regular monthly payments over an extended period of time. These

Personality and the DISC system

The DISC system groups people into 'personality types' according to how prominently they display a mix of four characteristics. DISC stands for:

- Dominance – relating to control, power and assertiveness
- Influence – relating to social situations and communication
- Steadiness – relating to patience, persistence, and thoughtfulness
- Compliance/caution – relating to structure and organisation.

days, patients can even have interest-free financing over two years. An important question to ask the patient after any fee has been presented is: 'How do you feel about that?'

Once the patient has agreed on a treatment plan and estimate, I would normally leave the consultation room and let the TCO take over.

The TCO should start by checking that the patient has no other queries or concerns. When it comes to discussing fees, the TCO needs to be empathetic and understanding as this is a sensitive and sometimes difficult part of the appointment for the patient.

The estimates are signed, with one copy given to the patient. Relevant consents are reviewed with the patient, and these will also need signing. Once all the financial matters have been discussed, then appointments can be scheduled.

Useful verbal skills

The dentist has to be clear on the following points in his or her mind:

- What does the patient have now?
- What treatment do you recommend to restore his/her mouth to health again or to create that beautiful and healthy smile?
- What are the advantages or benefits of proceeding with treatment?
- What are the disadvantages of not proceeding with treatment?

The following are a range of verbal skills that would be useful for both the dentist and the TCO to learn and start using on a daily basis.

Closure

- Is this the type of treatment you would like to receive?
- Is there any reason why we shouldn't schedule an appointment to begin your treatment?
- Do you need more information, about the actual treatment plan, or have I given you enough information for you to make your decision?
- Would what I am proposing fit into your goals?

Aesthetics

- If we can change your smile and have you looking similar to this (show a picture of a similar case that has been treated by you), would that make you happy?
- Would having a smile such as the ones we have just reviewed make you happy? Then we can get started very soon. Are mornings or afternoons better for you?

Preventive

- Keeping your teeth for a lifetime is an important goal for you, am I right? Then, working together we can help you try and achieve this important goal
- Do you agree that this type of treatment would let you restore your mouth to health again? When would you like to start getting healthier?
- Is this the type of treatment you feel would benefit you?

There are also some verbal skills that can be developed to deal with finance queries:

'Sarah, are you concerned about the financing of your treatment?'

'Keeping your teeth for a lifetime is important to you, and we want to make sure that the investment you make is going to be one that lasts for as long as possible.'

Diffuse the cost barrier by saying: 'Sarah, before I give you the results of my review of your treatment and what I'm recommending for you, let me tell you that if you have any concerns about the financing of your treatment, we have convenient, long-term options available right here in our practice.'

'I tell you this so that – for now

– we can both concentrate on your treatment. We will discuss our financial options in full, but for now let us concentrate and give our full attention to the treatment itself. We will make sure you are clear and comfortable with both the treatment and the finances. Is that okay?’

Or try: ‘Is there any reason why we shouldn’t or can’t go ahead and schedule an appointment to begin your treatment? How does that sound?’

Handling objections

If a patient has objections or asks further questions, then that is really a good sign. An objection is a request for further information, indicating that the person is interested in your proposal. The way to identify an objection is to ask ‘clarifying’ questions:

- Do you have any further questions?
- Have I made my explanation clear?
- Do you have any other questions for me?

The following steps are useful to remember when dealing with objections the patient has:

1. Hear out the objection
2. Actively listen
3. Reinforce the importance of the objection
4. Offer a solution to the problem
5. Check to see if the solution will work for the patient
6. Change the direction of the conversation – move forward
7. Close.

Another very useful conversational concept is that of ‘feel, felt and found’. Study the following conversation to understand how this concept works:

‘Sarah, I understand how you feel.

Many patients have felt the same concern about making an investment in comprehensive dental care until they found out that an investment in quality, comprehensive care now will provide you with better health, last longer, look better, and save money in the long run.’

Or: ‘I understand how you feel, Sarah. Many of our patients have felt the same way, until they found out that we are committed to comfortable

Handling objections

Sometimes patients need to be reassured that their investment in comprehensive dental work will be a sound one. Remind them that your treatment will:

- Provide better health
- Last longer
- Look better
- Save money in the long run.

dentistry here, and we will make sure your treatment is as short as possible and totally comfortable. Since you want to save the tooth, is there any other reason why you should not go ahead with the recommended treatment?’

General tips

I have read many books that I have found to be very useful, but two in particular stand out.

Raving Fans explains the importance of knowing what the customer wants, and details how to go the ‘extra mile’ regarding customer service.

Fish! takes a slightly different approach – talking about the importance of having the right attitude, and having fun! It tells the reader how to ‘be present’ – in other words, to focus 100% on the patient, and to ‘make their day’.

Also, to help offer five-star customer service, the following is a recommended list that my team and I came up with that we endeavour to use in our practice everyday:

The small touches matter

- Smile frequently
- Maintain eye contact
- Remember that in communication, 60% is body language, 20% is tone of voice, and 10% is verbal
- Listen attentively and be empathetic
- Use the patient’s name a few times in the conversation
- Use professional vocabulary and be courteous at all times
- Compliment each patient every time
- Make people laugh and have a fun environment
- Praise the patient on progress made

each visit (e.g. nervous, periodontal condition getting better, etc)

- Always take the patient’s coat/bag, put it away, and then assist the patient when putting on at the end
- Completely wipe any alginate off the face after an impression is done
- Offer glucose water, or a banana sliced on a plate (with a fork and tissue) if the patient is feeling faint, hungry, or nervous
- Avoid having your back to the patient
- Offer a range of Tempur cushions for patient comfort during dental treatment
- Make appointment notes about important events in the patient’s life (e.g. going on holiday, taking an exam, etc). Ask about them immediately at the next visit
- Send handwritten notes whenever you can (these cheer people up!)
- Send a gift for referrals – thank any patient that refers a new one to your practice.

Summary

A business either grows, or dies... it cannot just stay where it is. The world is moving on very fast. It is the practice that offers outstanding customer service and dental care, and is always thinking and acting in an entrepreneurial way that will be successful and profitable.

It is my hope that these three articles will help more dentists and their teams to systemise the way a new patient is welcomed and looked after. [PD](#)

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