

What Is New In Case Presentation?

By Corine Leech

With all the hype regarding Extreme Makeover and marketing, you need to take a look at your case presentation system. Where does case presentation begin? What protocol do you follow? Who presents the treatment? Who coordinates the financial side and the appointment side? Who is the patient's contact in the office? How long do you need for a *New Patient* consult? What about for a *New Patient Cosmetic Consult*? How much of the appointment really needs to be doctor time? Do you charge? No charge consultation, what does it include? How do you create the value in what you do on that appointment? This is just a small portion of the list of things that you need to have in place to be successful in case presentation.

In our practice the LVI Extreme Makeover Campaign and LVI marketing, combined with our own efforts within our own markets certainly are bringing in the new patients. These patients want a great smile and to be comfortable. They are pre-educated by our ads and our web sites. Most of them are pre-sold on the treatment they want. They are just looking for the right practice to meet their expectations, how GREAT is that. We need to be ready to deliver and meet their expectations. Your case presentation is where to begin.

Where does a case presentation to a New Patient really start? I believe it starts with that first phone call. Who in the practice takes those phone calls; I would recommend that it not be your poor front desk concierge, who already is multi tasking. Let it be someone who can give that new patient their undivided attention. Someone who can build a relationship with the patient from the start. Someone who really believes in you and the wonderful dentistry you provide should be your biggest supporter on your team. Let that person be your New Patient coordinator. The NP coordinator needs to be able to take as long as he/she needs to establish a relationship with the new patient at the other end of the phone uninterrupted. Value in you and your practice are created on this very first contact. Have NP coordinator send out a welcome pack and personalize it to things the patient was interested on the phone. A great way to do that is a customized CD presentation that you make with the help of The Edge Server from CAESY. CAESY at Home allows you to do many neat things. Imagine being that new patient and getting a CD made just for you, that says you listened to what the NP had to say , and went one step further to provide them with more information prior to their appointment. The case presentation is well on its way. Be sure you track your referral source for future use.

On the NP consult appointment the NP coordinator that spoke to the patient on the phone should be in front to greet the patient as they arrive, just as you would a guest in your home. I think giving the patient a NP tour of your practice creates value and also helps the patient to feel comfortable in their new dental home. The NP tour is an ideal time for your coordinator to sing your praises, showing you're before and after cases on the wall. Explaining all the advanced training you and your staff have taken to be the best. I think showing off all the technology that the practice offers helps the NP see how different you are from any practice they have been in before. Show off all the amenities you offer for their comfort also. All of this helps the patient to see they made the right choice in

coming to your practice. Make them feel special and create that much talked about “wow experience”.

Next step in the case presentation is the conference room, where the NP coordinator reviews the patient’s forms with them. Reviewing personal information, (be sure to get email addresses and cell phone numbers), health history and dental history. The NP coordinator starts gathering the information on what the patients wants you to do for them. In our practice we pay special attention to the neuromuscular questions that our incorporated into our dental health history form, even if neuromuscular is not the patients chief complaint, it plays an important role in our information gathering process. It is important to gather as much information regarding the patient as possible it all plays a part in their treatment, long term. Once the coordinator has gathered all the information she explains to the patient that your NP consult is different then most. That you will be taking a portrait photo and then about twelve to thirteen digital photos of their teeth. Notice I did not say x-rays, I said digital photos. The value of digital photography is tremendous in this type of dentistry, to both the patient and the practice. Once the photos are taken the patient will be able to review them with her on the monitor in the conference room and help in deciding what she would like to see improved. Letting the patient know that they will see their mouth like they never have before, and will be able to talk about what they are interested in changing. The NP coordinator then reviews information with the doctor and he then greets patient in the conference room. After a brief friendly conversation, the doctor is off to take the photos. The patient is then introduced to a few specially selected Caesy modules that are related to the patient’s dental concerns. The doctor the downloads the photos in to a storage device like ImageFX or Dicom. They can also be downloaded into Windows viewing software. You do not have to use any fancy PowerPoint presentation or imaging software to create a successful case presentation. The dentist then reviews the photos with his NP coordinator and informs her of what treatment he sees. Please make note that to this point the actual doctor time is very minimal involved in this NP consultation. The NP coordinator is now back in the conference room to review the photos with the patient. Patients are amazed; remember they have never really seen their teeth in this manner before. It opens all kinds of doors and they own their dental health because they can visually see their own teeth. The next question always opens the door for the patient, “Mrs. Smith what do you see in your smile?” Wait and listen you will get all kinds of answers. Once the patient has had the opportunity to talk about what they would like to change the NP coordinator has the opportunity to share with the patient what the doctor has seen in the photos, and make treatment recommendations. Remember that through this whole case presentation process the patient is spending time with a person they have built a relationship with. It is a true trust relationship... They want to know how and when they can start their dentistry. This is when the job becomes fun!

Creating the treatment plan with the patient is extremely rewarding. As the NP coordinator she/he is helping the patient achieve the dental health they want. I think that the NP coordinator is the person to talk with the patient about the investment in their dental health, and answer questions regarding how the can make comfortable financial arrangement for the patient. Consider that in most practices they have separate

individuals for all these steps but why?? Your NP coordinator has formed a bond and established a true trust relationship with this patient - why hand off, let her be the patients contact in your practice. Patients truly like being taken care by one person; everyone can learn scheduling it is simple. Your NP coordinator knows what the patients needs are and can really “fluff” by saying “let me go ahead and personally assist you with your treatment schedule”. It makes the patient feel special and cared for.

What is unique here is as I am sure you have noticed the doctor had little involvement in the case presentation process. He diagnosed and turned the patient over to a trusted staff member. If you as a doctor can let go of the case presentation, you will see your case acceptance increase. Why??? Because the patient has a true bond with this member of your staff, they trust them. This makes it easy to do a no charge cosmetic consult, no real doctor time involved. It allows the patient to value the dentistry you can give them and truly hooks on your practice, then get technical, take your models, x-rays etc. “Mrs. Smith I am so glad you are excited about your treatment, let me get you scheduled to come back for the preliminary records we need to get you started on your way to your great new smile.”

This is a start to a new way of doing your case presentations that I guarantee once you apply and do not stray from, will become successful for your practice. Take the plunge, make the change. . IT REALLY WORKS!!!