

Presenters



Steven J. Anderson

Founder and CCO of Total Patient Service Institute

Co-Founder of Crown Council



Pam Peterson

President and CEO of Total Patient Service Institute

for today, as well as the topic expert
on many, many, many things.

QUICKPOLL

Which professional has the fewest cancellations:

Select one of the following:

- Primary care physician
- Hair salon stylist
- Proctologist
- Dog groomer

Poll in progress for attendees only.

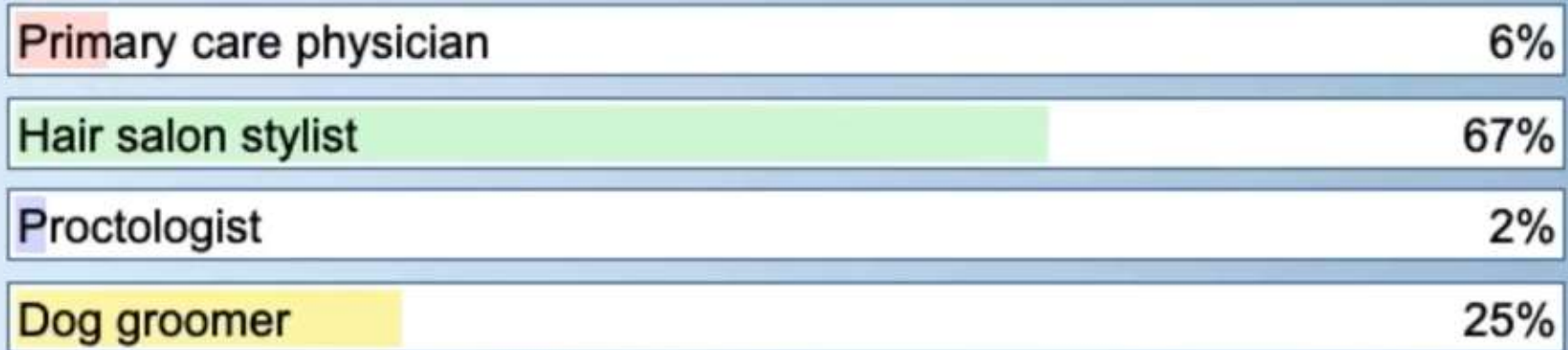
Submit

Pam wanted me
to put the mortician on this list.

QUICKPOLL

Which professional has the fewest cancellations:

Poll Results:



67% of you voted for the hairstylist.

RULE

**Patients
DO NOT
come trained!**

REMINDER

We **TEACH** people
how to
TREAT us.

Here's a second reminder
is we teach people how to treat us right.

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REMINDER

People are
People.

There is no 100% hard fast rule,
and the things that will add to the

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WHO is at Risk?

- **New Patients**
- **Hygiene Patients**
- **Financial "Flu" Patients**
- **Every patient on your schedule!**

Prevention

+ First Aid

of the things
that the of the patient categories.

Prevention

with our first prevention suggestion.

**Remember:
It is a
TEAM
effort!**



So the first prevention is
this is a team effort.

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RULE

PATIENTS place as much
importance on
their **appointment**
as **YOU** do!

is patient place as much importance
on their appointment

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Poll

One of the best
cancellation prevention
techniques for new
patients is:

So before you present this, here we go.

QUICKPOLL

One of the best cancellation prevention techniques for new patients is:

Select one of the following:

- Charge a fee for cancelling
- Double book
- Text, email and call repeatedly
- The doctor calls all new patients to welcome them to the pra

Poll in progress for attendees only.

Submit

All right, so

QUICKPOLL

One of the best cancellation prevention techniques for new patients is:

Poll Results:

Charge a fee for cancelling	12%
Double book	2%
Text, email and call repeatedly	6%
The doctor calls all new patients to welcome them to the pra	80%

I mean, you share the results,
so you voted to get a new set of.

Prevention

The **DOCTOR** calls
ALL New Patients

Doctor Call

“Mrs. Jones, this is Doctor _____. I am looking forward to meeting you during your appointment tomorrow at 3:00PM in our office.

I wanted to let you know that we will have everything set up and ready to go for you. If there is anything that I should know before you come in that would make your visit more comfortable, please give me a call at _____.

Otherwise, we look forward to meeting you tomorrow at 3PM. See you then.”

What I would say if I

Doctor Conversation Chair Side

So Pam, then the next the next prevention
suggestion here,

Doctor Conversation

“We want to do everything we can to help you get the outcome you want. We are committed to helping you move through the treatment in a timely and comfortable way. In order to do that...

that you want, right,
that we've just talked about.

Doctor Conversation

“We want to do everything we can to help you get the outcome you want. We are committed to helping you move through the treatment in a timely and comfortable way. In order to do that...

I need your help.”

Doctor Conversation

“In order to help you get everything you want; we need to make sure that your appointments are set at times when you have the **least likelihood of any type of delay or interruption in your schedule**, so nothing stands in the way of doing what we talked about today. Does that make sense?”

Doctor Conversation

“So if you work with _____, our appointment coordinator, we will both be committed to the schedule that the two of you put together to make sure everything happens as planned. Fair enough?”

Hygiene Conversation

So same thing with, you know,
keeping the hygiene schedule on track.

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Hygiene Conversation

“Congratulations” or “Here’s what we found today that needs some work. The best insurance policy you have to stay on track is to do your home care each day without fail AND make sure that nothing stands in the way of our regularly scheduled appointments.”

So with with hygiene guidance,
you have leverage patients listen to you.

Hygiene Conversation

“I want you to know that when we have an appointment scheduled together, I have

that time reserved especially for you. I work very hard to make sure nothing gets in the way of that.

So, if I could make a suggestion, do for yourself, what we are doing for you here in the office....”

I block that time, especially for you to make sure that nothing gets in the way.

Hygiene Conversation

“Make sure to put the appointment time on your calendar, that way if a potential conflict comes up, you can tell them that you have a prior commitment. Does that make sense?”

- Pre-appointment deposit
 - If a patient **no shows or negligently cancels their most recent one < 48 hours**, require a deposit that is refundable or can be added as credit toward any out-of-pocket expenses if they need treatment
 - Hygiene - \$75
 - Treatment - \$75 minimum up to 20% of patient portion (can negotiate down to 10%)
 - Get CC on file – like hotels, flights, etc.
 - A patient "forfeits" their deposit if they don't show up or cancel <24 hours...when they are reminded of that ("oh no I'd hate for you to lose your deposit...are you sure you can't keep this appointment?"), they often keep the appointment.

Relationship Link

A continuous **LINK** with the patient and the next team member in the **relationship chain.**

Scheduling Hacks

Hack #1:

Manage your schedule, so
your schedule doesn't
manage you.



Number one the pandemic manager schedule
so your schedule doesn't manage

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Verbiage

“What day of the week, Monday thru _____ do you have the most control over, where you have the least likelihood of any type of interruption in your schedule?”

Steve, what day of the week?

System

Hand the appointment card
to the patient and let them
fill it out.

If you're if you use appointment cards,
which we still recommend,

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Verbiage

“Please mark this important appointment on your calendar today. We look forward to seeing you at this time that has been reserved especially for you.”

There's some really bad
verbiage on appointment cards

System

Which method of
communication do you prefer?

- Phone
- Text
- E-mail

Do we call you text you or email
or send a carrier pigeon?

Verbiage

**“As a courtesy, we send you
periodic messages before your
appointment.
Will that work for you?”**

Pam will send you periodic messages
before your appointment.

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Thursday 12:00 PM

Steve, Your appt is at 9:30AM on Monday,
February 28, 2022. We are looking forward
to seeing you then!

Happy Day Dental

[214-433-0011](tel:214-433-0011)

If you have a fever, cough, or shortness of
breath, please contact us. For more
information on COVID- 19, please visit
[cdc.gov](https://www.cdc.gov).

TextSTOPoptout

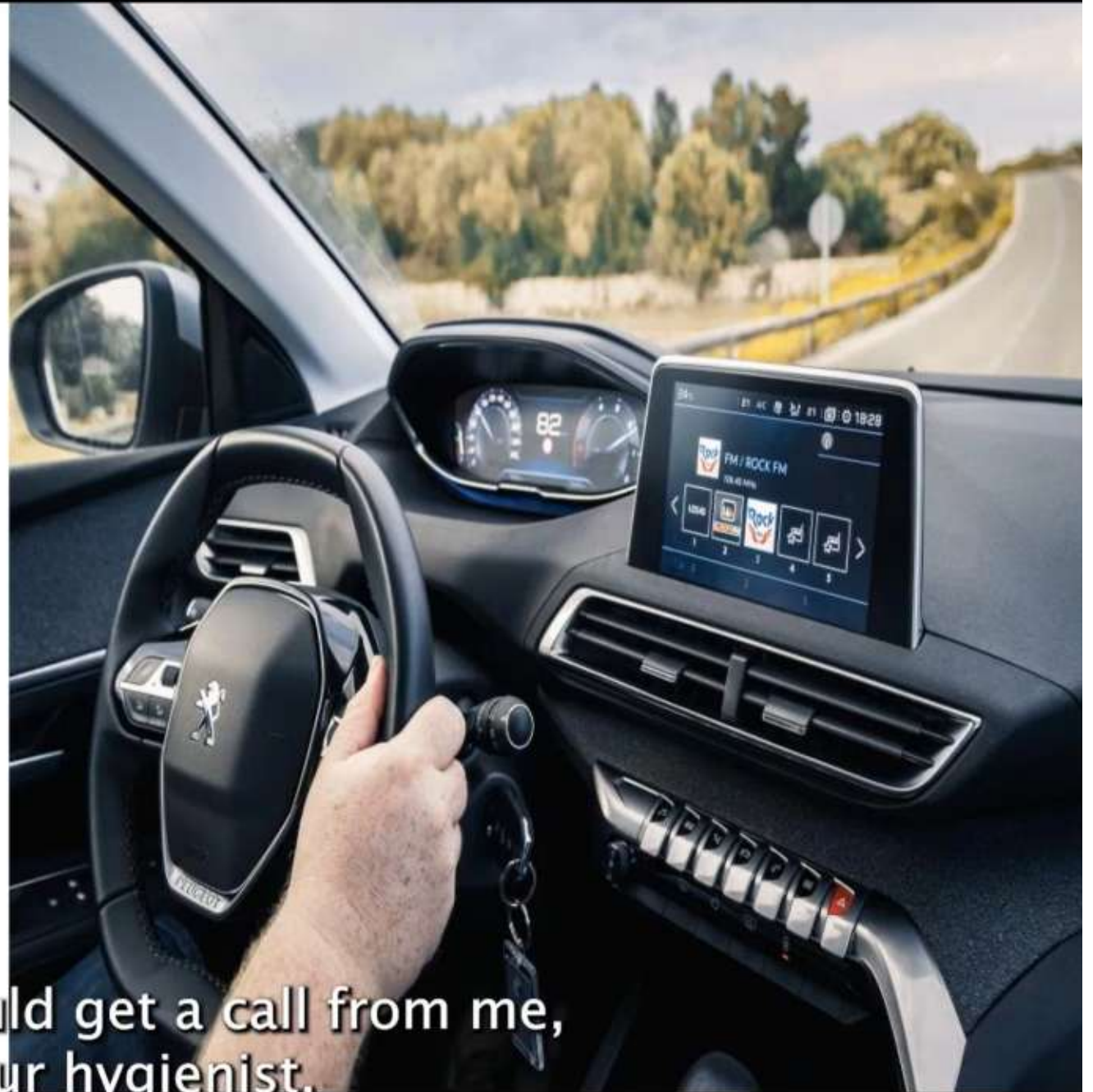


Hack #2:

Plan ahead

- **Excitement Calls!**

how you would get a call from me,
your hygienist,



Hack #3:

The unexpected will
always happen—
expect it.



The unexpected will always happen.

Who is on *your* ASAP list?

I know that when you come to work,
some days you'll leave

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Monday 9:00 AM

Chris, We have an opportunity to take care of your broken tooth tomorrow at 9:00AM.

Will this work for you?

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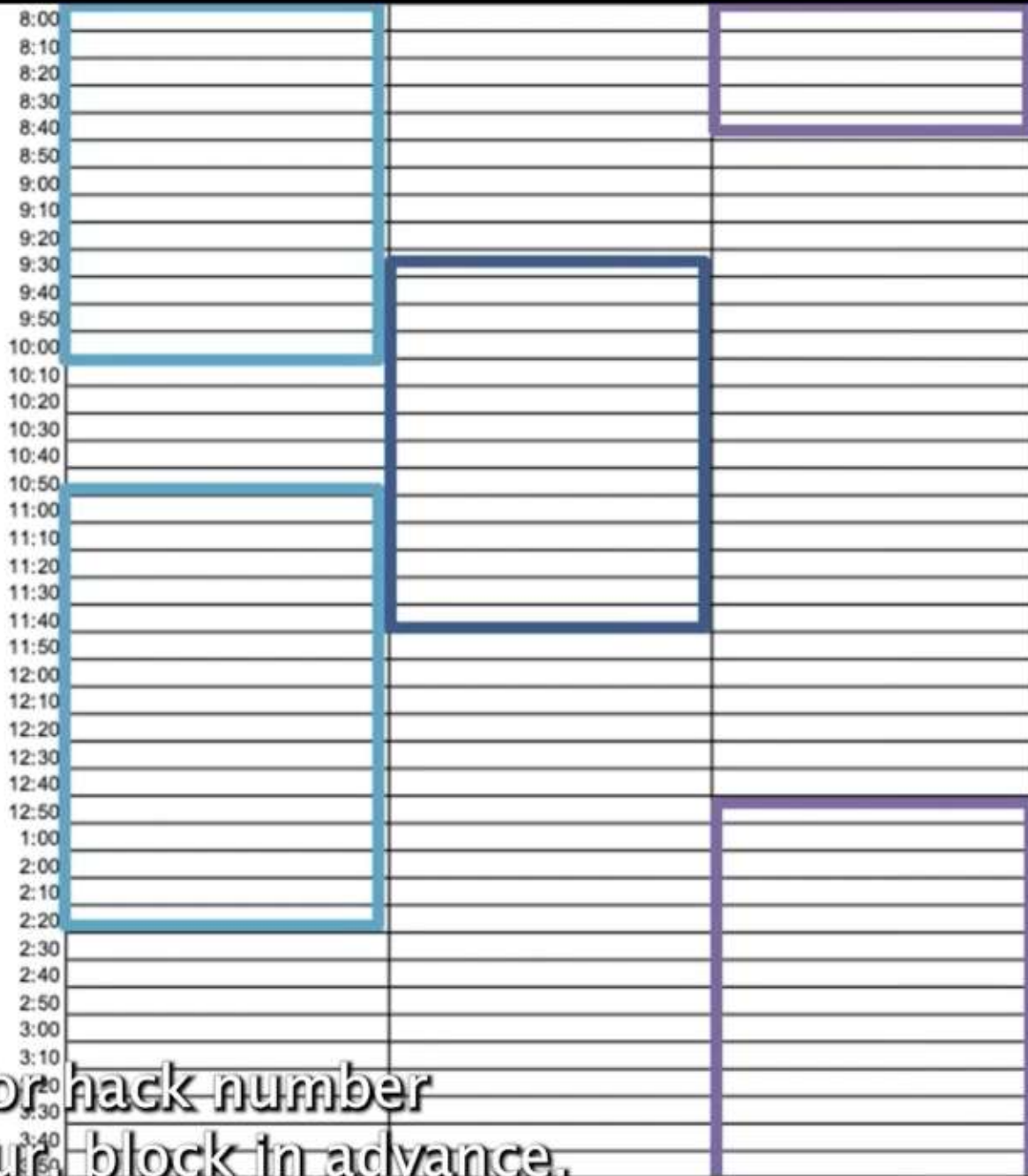
[214-433-0011](tel:214-433-0011)

TextSTOPoptout

you simply follow up with the patient
and it's as simple as Steve,

Hack #4:

Block in advance



OK, I'm ready for hack number
for hack number four, block in advance.

Hack #6:

24 Hour Rule



Hack #7

Confirm or Not Confirm?

~~CONFIRM~~

~~REMIN~~

Steve, Your appt is at 9:30AM on Monday, February 28, 2022. See you then!

Happy Day Dental

[214-433-0011](tel:214-433-0011)

If you have a fever, cough, or shortness of breath, please contact us. For more information on COVID-19, please visit [cdc.gov](https://www.cdc.gov).

TextSTOPoptout

If you



Hack #8

Patient Commitment

The most powerful words for
patient commitment and compliance:

OK, hack number
eight is patient commitment.

Hack #8

Patient Commitment

The most powerful words for patient commitment and compliance:

WILL YOU

So any time I'm scheduling an appointment here would be a suggestion.

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Verbiage:

“Mrs. Jones, this is (your name) from (office name).
I’m calling about your
reserved appointment with Dr. _____ on
(day) at (time). I want you to know
we have everything
ready for your appointment and we are
looking forward to seeing you on (day) at
(time). Will you be here?”

calling, for example, I’d say, Pam,
this is Steve from Dr.

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Hack #9

Prevention

The Financial "Flu"

- Separate payment from the date of service
- Signed Financial Arrangements

And so what we recommend is as a benefit
for the patient,





When you charge someone for missing an appointment, it causes friction.

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QUICKPOLL

Which day of the week is the most dreaded cancellation day in the dental office?

Select one of the following:

- Sunday night
- Monday morning
- The last workday of the week
- Every day

Poll in progress for attendees only.

Submit

I keep going.

QUICKPOLL

Which day of the week is the most dreaded cancellation day in the dental office?

Poll Results:



29% of you said every day

Verbiage

Which Day of the Week?

of the week, just because of what happens
over the weekend.

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After Hours Message

“Thanks for calling (office). If you are calling after hours and would like to reserve an appointment, please leave your name and phone number and we will call you as soon as we return.

If you have a dental emergency or a conflict with your scheduled appointment, please call the doctor by calling _____. Our voice mail system is not monitored for scheduling changes. Thanks for calling.”

Cancellation Calls

Illness Remedy

Cancellation Calls

Illness Remedy

Rx |

Reappoint **Now!**

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So the first prescription is reappoint.





well enough to call you
to let you know that they are ill.

Rx 2

Know your T³

Today

Tomorrow

Two Weeks

The Cancellation Call

Oh _____, I am so sorry to hear you're not feeling well. I hope you feel better soon.

Let's go ahead and reschedule your appointment so we can keep you on track.

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I'm going to put you on the spot.



Cancellation Calls

RESPOND

(Pause)

And here's here's how Pam,
how you respond.

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Cancellation Calls

RESPOND

(Pause)

“OH”

Attempt #1

Thanks for holding Mrs. Jones. I'm reviewing your records. We have you reserved on _____ (day and time) with Dr. _____ for (scheduled treatment), which I know you said you wanted to have done before your next high school reunion (Her M&M)."

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OK, OK,



Attempt #1

Thanks for holding Mrs. Jones. I'm reviewing your records. We have you reserved on _____ (day and time) with Dr. _____ for (scheduled treatment), which I know you said you wanted to have done before your next high school reunion (Her M&M)."

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if we were able to bring in it finally?

Attempt #2

“Mrs. Jones, let me see what I can do to find something that will work for all of us. Which day and time do you have the **most control over**, when you have the **least likelihood** of any kind of interruption in your schedule, so we can prevent this **from happening again?**”

The panelists say that I say, you know, Pam, I just can't come in.

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Frequent Offenders

“Mrs. Jones, I need your help. For some reason we have not been able to make these appointments work like we need to. I just looked back and we have rescheduled this appointment at least 5 times. What would you suggest we do to get this back on track?”

Frequent Offenders

VIP List:

- Hectic schedule
- Organizationally Challenged
- Short-term memory problems!

I have a VIP list
that I'll be happy to put you on,

Next Steps...

- Take it to the team
- Choose the hack you'll get started with today
- Track your success
- Highlight the “Save of the Day!” at your MOM
- Download the E –Book