

# Treatment & Financial Protocol (BRIEF)



System to increase case acceptance



Consistent communication across team



Emotion → Clarity → Commitment

# 0. Pre-Frame (Before You Start)

1

Sit/stand next to patient (not across desk)

2

Keep it private and calm

3

Hold the treatment sheet (control flow)

4

Know patient WHY (Primary Interest)

5

Skip this → you lose before you start

# 1. B — Benefit (Lead with WHY)

Start with  
emotion, not  
numbers

“I know it’s  
important for you  
to \_\_\_\_ so that you  
can \_\_\_\_”

Example: Health →  
reduce meds →  
feel better

No WHY = no case  
acceptance

Numbers without  
emotion =  
rejection

## 2. R — Review Treatment

Explain simply  
and  
confidently

What it is

How many  
visits

What's  
included

What they get

No jargon, no  
rambling

## 3.1 — Introduce Fee

Say it clean, no hesitation

Total → Insurance → Patient portion

“Total is \$X, insurance \$Y, your portion \$Z”

Then STOP talking

## 4. Pause (Critical Step)

Let them process

Allow silence (even if awkward)

Do NOT jump into financing

If needed: “Tell me what you’re thinking”

Rule: whoever talks first loses

## 5. E — Explore (Objections)

Diagnose real concern

Ask: Total or monthly budget?

Ask: What concerns you?

“Think about it” → cost, need, or timing?

“Talk to spouse” → What will they say?

## 6. Payment Options (After Explore)

1. Prepay (5% savings)

2. Split (half now, half before visit)

3. Financing (Cherry, etc.)

Close: “Which works best for you?”

NOT: “Do you want to do this?”

# 7. F — Finalize

Order

Order matters:

Lock

Lock financial commitment FIRST

Schedule

THEN schedule appointment

Select

Select option → collect → sign → schedule

# Payment Rules (Non-Negotiable)



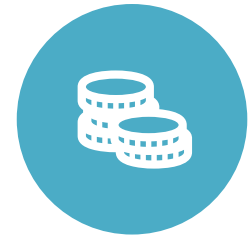
PAYMENT BEFORE  
APPOINTMENT



NO DAY-OF  
PAYMENT



SECOND PAYMENT  
BEFORE VISIT



IF UNPAID →  
RESCHEDULE

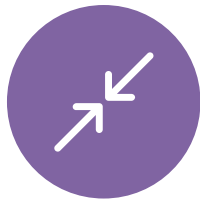
# Handling Objections



“I can’t afford it”  
→ Monthly budget?



“I’ll think about it”  
→ What specifically?



“Pay day of” →  
Redirect to options



“Cheaper elsewhere” →  
Speak to quality



“Why prepay?” →  
Flights, hotels analogy

# What NOT To Do

Don't lead  
with numbers

Don't rush

Don't skip  
pause

Don't push  
signature  
early

Don't ignore  
objections

Don't sound  
unsure

# Bad Example

“Here’s total... options... sign this?”

No emotion, no pause, no connection

Kills trust instantly

# The Real Game

Everything depends on ONE thing:

Do you know the patient's WHY?

No WHY → no emotion

No emotion → no urgency

No urgency → no acceptance

# Big 3 Takeaways

1. Lead with WHY

2. Pause after fee

3. Payment BEFORE scheduling

Everything else is secondary