

# THE ULTIMATE FIRST CALL

Are you ready when prospective new patients call the practice?

by MARY LYNN WHEATON, RDH, MS, DIRECTOR OF CONSULTING, PRIDE INSTITUTE

**The old adage,** “You never get a second chance to make a good first impression” is so appropriate when thinking about the opportunity to convert a first-time caller into a loyal patient. The first minute of the call can make or break the relationship.

## A shared goal

Let’s face it, when you pick up the phone and talk to a potential

new patient, the practice wants a certain outcome and so does the caller. The team wants to schedule callers for a new-patient appointment and callers want to feel they have found a safe place that will satisfy their dental and emotional needs.

Because the practice and the patient both want positive results, this should be simple. Unfortunately that is not always the case.

## Have a plan

So what can you do to make this first-impression call a resounding success? By creating a vision and strategy for these patient touches, along with focused training and practice, the dental team can gain competence and confidence in these vital skills.

We suggest following a template. Emphasize “We Care Questions” to gather the information needed while building a strong foundational relationship and providing your new patient with a different experience that exceeds expectations. This is what can set you apart from your competition and help you develop a great patient partnership from the get go.

The phone rings and you answer, “Good morning, Dr. Shine’s office, this is Sylvia, how may I help you?”

Here’s a great beginning. Patient asks, “Does your dentist do implants?” Your immediate opening script should be, “To answer your question and make a proper appointment for you, may I ask you a few questions?”

First, may I ask your name?” Obviously the caller will say yes, but isn’t that a better way to begin than the typical, “Yes he does, what insurance do you have?”

## Stay on course

When a patient calls in with specific questions like, “Where are you located?” or “Do you see emergencies?” it’s not unusual to fall into the trap of answering the direct question without even stopping to ask the caller’s name.

That’s an easy mistake to make if you are trying to be helpful and informative, but the ultimate goal of the call must be centered on creating the relationship. Better still, answer the implant question with more than a yes. Instead say, “The good news is you made the right decision to call, because our dentist does wonderful work with implants. Our patients love their results and you will, too.”

## Referral recognition

Once you have introduced yourself and the patient has done the same, ask, “Whom may we thank for referring you to us?” This is always a great way to acknowledge commonalities between you and the patient, as well as set the precedent with the new patient that your patients of record are ambassadors of the practice. This also allows you to track the return on investment on any of your marketing opportunities.

Do acknowledge and offer thanks for any compliments given and again take the opportunity to reiterate that the prospect is making the right choice in choosing your practice because this kind of compliment is typical for your doctor and team.

## Taking control

An open-ended question of, “What concerns do you have that prompted you to call?” is now in order. This will let you evaluate the caller’s immediate needs. Take notes on your computer or a telephone information slip so you can share this information with your teammates when this patient does come in for the first appointment.

At this point, you are in control of the call and the remaining information that you need should be easy to gather.

- ⊙ An address to send forms to (if you do)
- ⊙ Contact information

## FRONT DESK TIP:

Having a plan for how to handle new patient calls is important, but to get the most out of the plan you need to practice putting it to use. Role-playing and rehearsing these calls with your front desk staff members can help them be ready for just about anything real callers may ask.



## How not to handle a caller

Here are just a few of the incorrect ways to handle calls from prospective patients:

- ⊙ “Doctor’s office, HOLD please!”
- ⊙ Putting callers on hold forever and having them listen to a recording of how much that call means to you.
- ⊙ Ending conversations with the deadly four-letter word, “OKAY, call us when you’re ready!” when the prospect says, “I’ll think about it.”

- ⊙ Financial and insurance information

We find that asking, “May I ask how you will be taking care of the fee for this appointment?” is an appropriate way to find out if the caller has dental benefits. Be prepared to discuss how you handle insurance, including what you do for your patients who have insurance and for those who do not.

## Other call topics

Of course, not all calls start with the prospect wanting to make an appointment. Many inquiries will be about procedures, costs, promotions, etc., so you must be prepared for these different scenarios. Remember to always be positive. Describe what the practice does do, not what you don’t do. Your verbal skills and active listening, showing empathy, speaking clearly and slowly, with sincere interest (not making it sound like you’ve said this 100 times that day) and focus will make an impression on these prospects.

Close the prospect into an available time by giving the caller a choice of two appointment times that might work. And close by asking, “So that we can make your visit as comfortable as possible, is there anything else you would like us to know about you?” and “What questions might I answer for you?”

As in, “Jerry Maguire,” when Renee Zellweger says to Tom Cruise, “You had me at hello,” you want your prospects to say the same thing at the end of this call. ● Mary Lynn Wheaton, RDH, MA, has 25 years of experience in all aspects of dental practice management and serves as consultant team leader at Pride Institute. She specializes in practice development, team building, group interaction and customer service and is known for providing interactive in-office training and dynamic workshops. Mary Lynn can be reached via e-mail at marylynnw@prideinstitute.com.

# Brilliance & Beauty



IRIS  
USB Intraoral Camera



ILLUMINATE



FOCUS



CONNECT

Bring the power of the new IRIS Intraoral Camera into every operatory. This precision optical instrument features an easy to use 5-point Focus Wheel and unique USB connector that fits in a standard delivery unit. The elegantly streamlined profile has a much smaller, specially designed soft-tip with brilliant 8-point LED lighting and Sony’s Hi-Resolution CCD for the finest picture quality. Best in its class. When quality and performance matters, see why Digital Doc is the #1 choice in intraoral cameras.

To find out more call  
1-800-518-1102 or visit us  
at [www.digi-doc.com](http://www.digi-doc.com).



© 2010, Digital Doc LLC, 4511 Golden Foothill Parkway, B Dorado Hills, CA 95762. The Digital Doc logo and IRIS logo are trademarks of Digital Doc LLC. All rights reserved.

Getty Images / Left: Andreas Brandt, Opposite: Anthony Lee