

The Grand Tour

Don't just show a new patient around the office—show off!

By Cathy Sundvall



A new patient's first experience at your office shapes not only their attitude towards you, but also their compliance and the likelihood that they will refer you to their friends. Here is a step-by-step guide to making sure that your office makes the best possible first impression on your new patients and their parents.

Greeting the New Patient/Parent

The new-patient coordinator either checks her patient-flow screen or is notified by the front desk that the new patient has arrived. The new-patient coordinator goes to the receptionist and picks up the patient's medical/history health form. She now proceeds to the reception area, walks directly to the new patient, extends her hand, and says, "Hi, Shannon, my name is Cathy, Dr Smith's new-patient coordinator. Welcome to our office. I was looking forward to meeting you. Shannon, who did you bring with you today?" (Let the patient introduce the parent.) Extending her hand, the new patient coordinator greets the parent. "Nice to meet you Mrs. Sundvall, I spoke with you on the phone. Thanks for bringing Shannon to our office. If you and Shannon are ready, I would like to take you on a tour of our office." Before the treatment coordinator goes to the reception room, it is imperative that she knows the last name of the parents. We often see patients who have a different last name than their parent.

What to Show Off



Cathy Sundvall

Take the patient/parent on an office tour. Depending on the patient flow and the availability of the orthodontist, the office tour can be given before or after the orthodontist evaluates the patient. Ideally, you want to show off your office prior to completing the initial exam. This is the perfect time to state the benefits of your office.

Benefits could include:

- Computerized check-in, scheduling, and confirmation for patient service;
- a game room to entertain patients and siblings;
- an on-deck area for brushing and flossing prior to appointments;
- contest boards to promote an entertaining and relaxed atmosphere;
- rewards to encourage patient compliance;
- digital imaging and x-rays for instant viewing and patient education;
- sterilization techniques and equipment that exceed OSHA standards;
- patient managers so that each patient has his or her own "personal assistant"; and
- a staff lounge for meetings and continued staff education.

A Sample Script for the Tour

"Good morning Shannon and Mrs Sundvall. My name is Cathy, and I will be assisting Dr Smith in your evaluation for orthodontics. If you could follow me, I would like to show you our facility, meet some of our team members, and take you to our x-ray and photography area for the first step of your visit.

"This is our reception area, where we just love to show off our patients. As I am sure you noticed, we have bulletin boards everywhere with smiles of patients just getting started and those that have completed their orthodontics. Dr Smith always wants to be in the pictures, especially at the end of treatment. He is really proud of the final result and wants to say thanks

to the patient for helping him create their great smile.

Here in our reception room we have a refreshment area. Coffee, tea, sodas, juice, and water are always available, so please help yourself. There is no charge. Always check this area when you come in, because sometimes we have cookies and cupcakes on special occasions.

“One of the systems we take pride in and that really helps us keep on time is our check-in station. Every time you come to visit us, please use this computer to check yourself in to our patient-flow monitor, which is back in our operatory. By doing this, you are ensuring your appointment will be on schedule for both arrival and departure. Our goal for every patient is zero wait time; and if we told you your appointment would be for 30 minutes, then you should expect to be done within the time frame. We know your time is valuable.

“Did you notice our bulletin board with the ‘Guess How Many Feet of Floss’ contest?

“Every 10 to 12 weeks we have a contest for our patients. Because we see our patients over a 1- to 2-year period, we want to keep their experience new and exciting, so we are always coming up with different ideas to make their visit fun. Our patients tend to get excited when they see the prizes we give to the top three winners. So don’t let me forget to let you enter how many feet of floss you think is running through the office.

“Around the corner is our game room. We wanted to have a place just for the kids to go—their own special room where noise does not matter. We have video games, computers, great music, and books just for kids. You are more than welcome to come a little early for your appointment or stay a little late to play.

“This is our on-deck/tooth brushing area. We keep a supply of disposable toothbrushes, floss, and mouthwash for you to use prior to being seated and checked by Dr Smith. We grade every patient at each visit on his or her oral hygiene—in other words, we grade you on how well you are brushing and flossing at home. We know how much you want straight, white, and healthy teeth, and we are going to help you along the way. Once you check yourself in at the computer station, you can come to this area, check your teeth in the mirror, and—if you want—floss, brush, and rinse with the mouthwash.

“Another ongoing event that we have in the practice to motivate our patients is an incentive program. At each appointment, you have the opportunity to earn five ‘patient dollars.’ You get \$1 for being on time for your appointment; \$1 for great oral hygiene; \$1 if you have no broken wires, brackets, or appliances; \$1 for great compliance with rubber bands, headgear, or expanders; and \$1 for wearing in your practice T-shirt.

“We have prizes that you can buy with your ‘patient dollars.’ Here is the list showing the prizes and the value. Our goal is to help you keep on track with your treatment by encouraging great patient cooperation

and enthusiasm. I am sure you will do a fantastic job and earn many ‘patient dollars.’

“Here in our records room, we have the latest in digital x-rays and photography. The benefit of using digital imaging is the ability to quickly download the picture or x-ray into our computer system, making it available at every patient chair throughout the practice. This capability allows Dr Smith to review your images and analyze your bite and facial aesthetics without your being in the chair. In addition, each patient manager can bring the patient’s x-rays up at each visit to monitor tooth and root movement.

“This is our sterilization area. We either throw away or sterilize everything that is used during our patient’s visit. Our goal is to exceed OSHA standards and do everything possible to ensure your safety and ours.

“Shannon, this is Doreen. Doreen has been working for Dr Smith for 20 years. Dr Smith hired her when she was a baby. Doreen is one of our patient managers. That means she assists Dr Smith in the treatment and care of her special family of patients. In other words, if Doreen was your patient manager, she would work with you and Dr Smith at every visit to treat your orthodontic needs.



Online Extras
For more advice from
Cathy Sundvall, visit
OrthodonticProductsOnline.com
and search for her name.

“Typically, in most orthodontic practices, patients are seen by the first assistant available. We wanted to give you a special service and help you feel comfortable at each visit, so you will always see the same patient manager. Every now and then, an emergency or situation may arise and you may need to see another patient manager. I want you to know that they are all great and have worked on my teeth throughout the years.

“Last but not least, this is our staff lounge. As you see, we have a full-service kitchen. We love to eat. At our weekly meeting, Dr. Smith uses this room and the chalkboard for continuing education for the staff. On a monthly basis, we invite general dentist and their staff to our office for lunch, and we do a presentation on orthodontics to increase their knowledge and let them know what we are doing in the way of new appliances and identifying patients that need braces.”

If your practice takes patients on tour, be sure the office and all the team members are ready at all times. Coffee cups, soft-drink cans, messy sinks, and paper clutter will convey a poor office image. Team members should all smile and say hi. ☘

Cathy Sundvall has combined her practice-management and clinical expertise to consult, coach, and train staff members in the areas of clinical efficiency, new-patient processing, marketing, customer service, and team performance. She lectures nationally, has published numerous articles, and has developed training manuals. She can be reached at csundval@earthlink.net.