



ORTHO 2

# Implementing Lunch and Learns with Hygienists

## Getting Ready

- Determine a list of offices you would like to approach and prioritize the list. In the beginning it might be best to target your “B” offices. These would be the offices that refer intermittently.
- Run a patient list for that specific office. Notate briefly each patient’s treatment plan and any cooperation issues that might be affecting the course of treatment or creating oral hygiene issues for that patient.
- Contact the office: “Hi, this is \_\_\_\_\_ from Dr. Orthodontist’s office. I wanted to take your hygienists to lunch and so that we could have a chance to get to know each other better (or catch up with each other) and answer any questions they might have about our mutual patients. Is there a hygienist available that I could speak to?” Explain to the hygienist that this is just a get-acquainted or “catch up on things” lunch and that your hope is to meet with as many of the hygiene staff as possible. Have them suggest a lunch spot close to their office and find out the most convenient day and time for them. Send a handwritten note confirming the lunch and saying how much you are looking forward to seeing them.

## At least one week prior to the lunch:

Get a menu from the restaurant and fax it to their office. Ask that everyone make a lunch selection. Contact the restaurant and arrange for a table and pre-order the lunches. This will allow for more time to talk at the lunch and take the focus off of ordering. Collect any materials you would like to be able to offer to the hygienists including some or all of the following:

- Office brochures
- Referral pads
- One example of a New Patient Consultation Package

by **Natalie Beaton**

- Laminated chair side orthodontic reference guides
- Hygiene cards if they are being used as a part of your Wooden Nickel Program
- “The Straight Facts about Orthodontics” (A terrific book available through the AAO for the waiting area of your referring offices. Place a label on the inside jacket and on the back of the book: “Provided as a courtesy to Dr. General Dentist’s office from Dr. Orthodontist - office address, telephone and web site - Please contact our office to arrange a complimentary orthodontic evaluation if you would like to explore the impact orthodontics can have on your overall dental health.”). You may also want to consider putting a clear pocket inside the back cover of the book and include some of your referral cards.
- If you are currently using a patient education software with your patients (i.e. Screenplay, IACT, etc.), you may want to consider bringing that program on a laptop.
- Print before and after photos of any of their patient cases that might be educational to discuss and will demonstrate the fantastic results your office provides.
- You may want to bring examples of certain brackets, appliances etc.
- Write a summary of key points you hope to discuss on a 4 × 6 card
- Other: \_\_\_\_\_

## One day prior to lunch:

- Contact restaurant and confirm earlier arrangements.
- Contact the referring office and confirm time and place of scheduled lunch.
- Review the patient list to refresh your memory.

- Review your 4 × 6 card.

### Follow up after lunch:

- Send a follow up note thanking them for their time and suggestions (be specific i.e., "Thanks so much for your great ideas and oral hygiene instructions. I have shared those ideas with our clinical staff and they are already using them when they talk to new patients!")
- Follow up on any requests that they had for additional materials or information.

Review the lunch and information received from that office at a staff meeting. Discuss and implement any changes that would be beneficial to the service you provide ☺

# About the Author

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Working exclusively with Ortho2 clients, Ms. Beaton has a practice management focus that maximizes the use of the technology specific to ViewPoint software. Ms. Beaton's extensive knowledge of both the most current practice management trends and the ViewPoint system allows her to help any office to turn ideas into day- to-day reality.

Prior to forming her own consulting business, Ms. Beaton had over eighteen years of hands-on experience in both the orthodontic and dental industry in varied roles of treatment coordinator and financial administrator.