



ORTHO2

Ortho Practice Success, Customer Service, and the TC

by **Dr. Roger P. Levin**

At one of my recent ortho management seminars, I was asked numerous times, "How can treatment coordinators (TCs) improve their close percentage for new patient consults?" With the economy still underperforming, the ability to start new patients takes on even more importance, making the TC perhaps the most critical position in the ortho practice. As business management guru Peter Drucker once said, "Nothing happens in a business until a sale is made."

Until 2007, TCs did not need high-level skills in the areas of influence, sales, and interpersonal relations. They were able to follow a few basic presentation guidelines, lay out an overview of ortho treatment, include the orthodontist in the consultation, and close a reasonable number of cases.

While most TCs weren't achieving the Levin Group target of starting 90% of cases, they were still successful enough for most orthodontists to make a reasonable living. This all changed when the recession hit the United States. Since that time, there have been significant changes in the business of orthodontics. For example, there are fewer patients seeking ortho treatment today than in the past. While this situation is improving as the recession slowly abates, it is taking time for practices to grow again due to the prevalence of outdated systems, including those that involve the TC.

The question for each orthodontist is this: Is your TC up to the challenge that the new orthodontic economy presents?

Case Study – How One TC's Performance Sabotaged Case Acceptance

A recent experience of mine may help cast light on how TCs affect practice production. A good friend asked me to go with him and his child to an ortho practice for an initial consult. He wanted me to provide an objective, unbiased opinion about this practice, which he said had a very good reputation in his community.

The visit was very illuminating. While the staff was pleasant, they were inattentive while we were kept waiting more than 20 minutes past the appointment time. When we finally met with the TC, she seemed overconfident, assuming that treatment would be accepted without any effort on her part. She asked no questions about my friend's child and showed no interest otherwise. All she did was deliver an uninspiring 15-minute monologue, concluding with a statement that theirs was the best practice without ever saying why.

At the end of the visit, before I even had the opportunity to share my observations, my friend promptly informed me that he would be taking his child elsewhere for ortho treatment. I was hardly surprised.

What went wrong? In short, the practice had reached a customer service plateau.

Unfortunately, Levin Group has encountered this situation – a well-known and respected ortho practice that has allowed its customer service to fall short – many times. This office was beginning to lose whatever quality and energy that existed when it earned its formerly excellent reputation.

The problem in this practice was complacency. If people stop trying to improve, it may be time to consider another line of work. If reaching their true potential no longer motivates them, their performance can never be more than adequate at best.

TCs and other team members with no desire to improve their performance, or who believe there is no need to make improvements, are dangerous to the practice.

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The TC and Customer Service

Every ortho practice team member contributes to the success or failure of a new patient consult. But more than anyone else, the TC is in the best position to set an example and lead the way in customer service. She has primary responsibility for increasing the case acceptance rate. To achieve this, she must be continuously on the lookout for ways that she and other staff members can improve the quality of the patient experience in the practice before treatment begins.

In the ortho practice I visited, the TC had become a liability. Although she was pleasant, she displayed little enthusiasm. Even worse, she devoted too much time to reviewing practice policies, heavily emphasizing the parent's responsibility for paying fees. While this kind of information needs to be conveyed, it must be done the right way, using excellent scripting.

Habits Do Not Equal Systems

Before the recession and its devastating effect on ortho production, practices could operate very loosely and inefficiently. High demand and large numbers of new patients per month could hide a multitude of sins concerning how an office presents cases. After the recession and a slow recovery, the vulnerability of ortho practices was quickly exposed. No longer was case acceptance easy. No longer would parents accept treatment for their children without hesitation.

Consumer caution and increased competition mean that today's TC must create value that will attract new patients and motivate their parents to accept treatment. The old systems for delivering customer service must be replaced with new systems to improve performance and increase production. Ortho practices committed to making these changes are the ones that will achieve their goals.

Every ortho practice needs to reevaluate how they are perceived by patients and parents. Would you and your team respond yes or no to the following:

- The phone is answered within two rings.
- The front desk coordinator:
 - Answers the phone using the words thank you and convenience at least three times in the conversation.
 - Tells new callers how delighted she is that they called and how much the practice enjoys new patients. (The Levin Group Data Center™ consistently demonstrates that, although most staff members say "yes", the true answer is "no".)
 - Uses a brief script creating trust for the doctor and the team by promoting attributes of these individuals in a discreet way.
 - Talks about all of the fun aspects of the practice and why children enjoy coming there.

- Always asks who referred the patient and then compliments that individual or doctor.
- Uses a script to transfer trust to the TC and build her reputation so that when the parent or patient meets the TC they already have confidence in her abilities.
- The TC:
 - Makes the confirmation call to introduce herself to the parent or patient.
 - Greets and escorts parents or patients from the reception area within three minutes of their arrival.
 - Welcomes each new parent or patient with warmth, enthusiasm, and energy.
 - Gives a tour of the office to create trust and the impression of excellent care.

How many YESs or NOs you check will illustrate how effective customer service is in your practice. Too many NOs should drive a desire to redefine and improve customer service to create higher levels of performance. Every TC should be deeply involved in advising how to shape the new patient and parent experiences. Customer service plays a major role in raising the case acceptance rate—and it is one of the TC's main responsibilities.

The job description of TCs today is vastly different from what it was a short time ago. In the post-recession economy, TCs need to use the most advanced techniques to be successful. By examining their own interactions with prospective patients and parents—and also observing how other staff members interact—TCs can prevent the practice from reaching a customer service plateau. To accomplish this, they must recognize that there is always room for improvement and that the necessary changes can be accomplished by replacing obsolete systems with new ones. ☺

About the Author



To learn more about how to grow your ortho practice, attend Dr. Roger P. Levin's seminar on May 1–2, 2014, in Chicago. Ask your Ortho2 Systems Consultant how you can receive an educational grant to attend this seminar free.