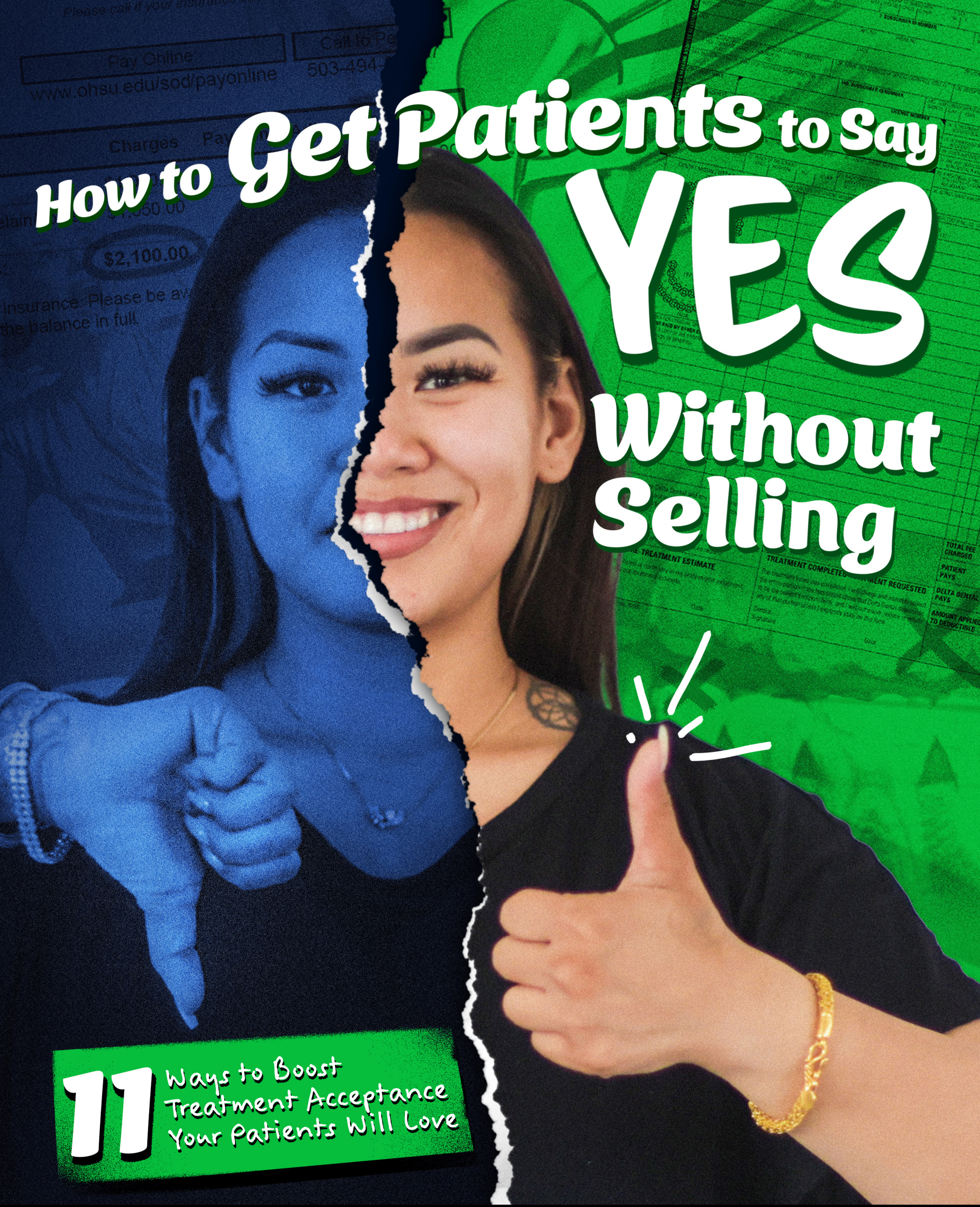
How to Get Patients to Say YES Without Selling



11 Ways to Boost Treatment Acceptance Your Patients Will Love

DENTALINTELLIGENCE

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Have you ever taken your car in for a simple oil change and had the mechanic return with a laundry list of problems? You said "please change my oil." They said "okay, but please give me another $1,200 so I can fix problems you didn't know about and don't understand."

It feels awful. And if you've ever had a difficult conversation with a patient about the difference between a "deep" cleaning that isn't 100% covered by insurance and a prophy, you know what we're talking about.

Being the bearer of bad news is no fun. But it's even more difficult to see patients reject tx (treatment) repeatedly knowing they're likely headed for tooth loss. Some patients are concerned about cost, some don't understand treatment options, and some are determined to think "it's not that bad" no matter what.

Whatever their objections may be, it's possible to overcome them in a way that doesn't let them see you as a shady mechanic. It takes patience (sometimes a lot of it) and commitment from your whole team, but increasing tx acceptance doesn't mean "selling" more dentistry. It means seeing and fulfilling the needs of patients — not just their clinical needs, but emotional needs as well.

Even if treatment is 100% necessary, a tx plan can feel like a shakedown if it's presented sloppily. Trust is everything. Here are a few ways that over 8,000 practices like yours increase connection and boost treatment acceptance without falling into the "selling" trap.

1. Start Building Rapport Before the Visit Starts

Your relationship with a patient starts before they walk through your door. The better that relationship is, the more smoothly the tx conversation will go. The trick is to make sure patients feel personally seen and appreciated, and not like a faceless number being pushed through a robotic system.

How does scheduling an appointment with you feel for a patient? Try scheduling an appointment online for yourself. Does your online scheduling system use personalized language that someone who isn't a dental professional can easily understand?

Can they text with someone at the front desk who responds with personal attention, or do they have to navigate an automated system as if they're calling a tech support hotline?

Truthfully, rapport building starts even before they try to schedule.

Tools like Modento's make every conversation uniquely personalized with customized verbiage in reminders, forms, requests, and even communication that would otherwise be completely automated. Dozens of tiny personalized touches create a snowball effect that makes patients feel welcome before they ever sit in your chair.

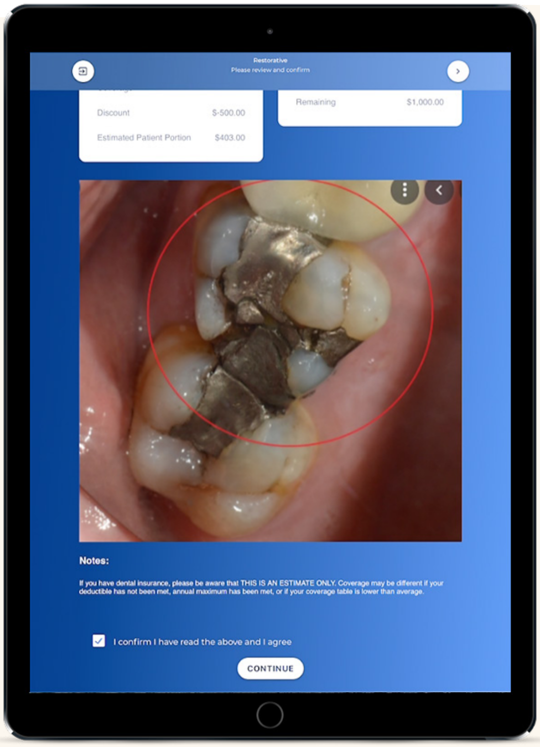
Truthfully, rapport building starts even before they try to schedule. People make assumptions about you based on your social and online presence. Be proud of your core values and let the whole world hear about them. Use social platforms to provide a sneak peek of your practice so patients aren't walking in blind. The more open and welcoming, the better.

2. Simplify Tx Presentation

The typical PMS is designed to make presenting tx easier for dental providers, not to make tx plans easy for patients to understand. That's backwards. If patients don't understand their tx plan, they'll immediately start questioning whether it's necessary at all.

A 20-step tx plan full of dental jargon and costs will achieve one thing: confusion. If you want case acceptance to rise, it has to be simpler, which makes customizable tx plans an absolute must.

For example, instead of presenting a patient with "MOD Resin #3," their tx plan should read "tooth-colored filling on the first molar on the right." A layperson can understand that, and if they want more



Learn more about tx plans [here.](#)

technical details, you'll easily be able to accommodate that.

Modento's customizable tx plans let you cater to each patient's unique dental IQ so that their tx plan is simple, understandable, and more likely to be met with "yes."

Open Dental also has something similar to this — the 'Layman's Term' field in the [Edit Procedure Code window.](#)

Simpler language is almost always better. English will always be more effective than Dentalese.

3. Tune Your Education for as Many Learning Styles as Possible

Some people learn by listening. Others learn by seeing a good visual, or reading a thorough explanation, or through motion. Regardless of what a patient prefers, they're in good hands — your hygienists'.

Hygienists should be the practice's resident educators. It helps ease the time burden and studies show that people are more likely to follow through when more than one person suggests the same thing. If your hygienists tune their education for as many learning styles as possible, tx acceptance is bound to rise without an ounce of sales pressure.

- **Auditory education** — Sit with the patient and read their tx plan aloud. Use customized language like we discussed in the previous section.
- **Visual education** — Include infographics, intraoral photos, x-rays, diagrams, etc. Sometimes seeing is believing, and the more clearly you can explain what they see, the better.
- **Written education** — Let them read along with you, and include supplementary details about common procedures for them to read at their leisure.

- **Kinesthetic education** — As you explain treatment, give them a pen, or a highlighter, or a stylus, and let them mark their tx plan however they please. Alternatively, you could deliberately circle and highlight important areas while they watch. Any sense of motion toward the crucial information will help.

Modento automatically includes all of these elements without an ounce of extra work from your team.

Once you've established this multifaceted educational approach, allow more senior hygienists to educate other staff members. This could even go beyond casual conversations and be included as formal training once a month at team meetings.

4. Master the Handoff

The exchange between the doctor and hygienist should be so effortless that the doctor can sit down, agree on the suggested treatment, and get a "yes" from a patient who's ready to move forward. This takes time and a lot of communication, but it's so worth the extra effort. Regardless of who is educating patients, utilize technology. There are many apps and programs to help educate with video and different languages. A patient should be well-informed.

Want to really master the handoff? **Join our mailing list** to make sure you get a copy of our "Perfect Handoff Checklist" coming later this month.

5. Find More Opportunities Every Morning

A few minutes at the beginning of the day will help you patch holes in your schedule, identify patients who need additional treatment, and build tx plans that are more likely to get a "yes."

A morning huddle isn't a new concept or a magical one. It's a common-sense practice proven to be effective. The first trick is consistently doing it. The bigger one is acting on your findings. You must

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act on the holes you find, but you don't have to do it manually.

Dental Intelligence's Morning Huddle helps you evaluate customizable goals for teams and individuals. It's ready for you every day so that in under 15 minutes you can see what needs to happen today, tomorrow, and next week.

With Patient Finder, you can use dozens of filters to find and schedule the patients who need the most treatment, so you can prioritize the vital services that are most advantageous for your practice. With a few clicks, you can find patients with overdue treatment, remaining insurance balances, and a history of on-time payment. Click a few more times, and they'll receive a text or email prompting them to schedule online, which they can do in under a minute. Voila, the holes in this week's schedule disappear.

6. Make Charts Personal, not Just Professional

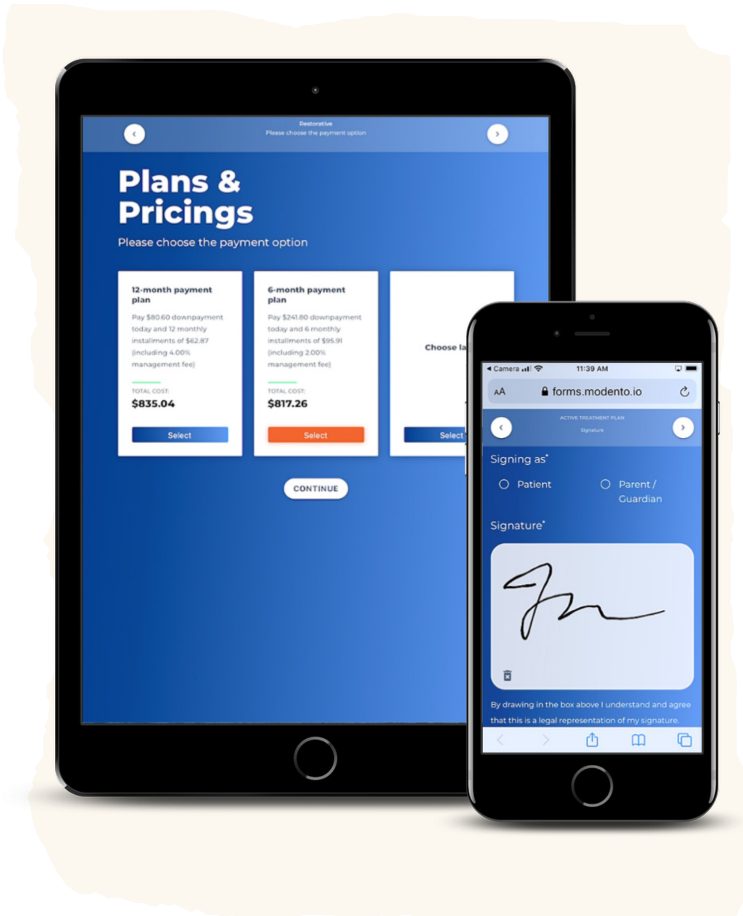
Unless you have a superhuman memory, you can plan on forgetting some of the life events a patient brought up at their last visit. Don't let those slip — be sure to include them on your charts so a rapport-building conversation can flow effortlessly.

7. Make it Affordable

That doesn't mean lowering your fees. It means presenting payment options right alongside tx plans so that the patient can connect the value of healthcare to the dollar amount they see.

The goal is to avoid a disconnect — if a patient sees a tx plan in the operatory but only gets to talk about payment 20 minutes later, or in a different room, they may have already forgotten why their treatment was so important. Suddenly, sticker shock is a roadblock to acceptance. Avoid that by giving them info up-front in a setting where the clinical importance of care can be clearly reinforced.

Use tools like Modento to present 2 or 3 payment options based on the patient and the tx being proposed. If there are too many options, decision paralysis becomes a factor.



Learn more about payment plans here.

Financing options will make even the biggest bills more approachable. With our Wisetack integration, we can help you offer affordable financing alongside every tx plan so patients have more options to get and afford the care they need. With Modento + Wisetack, patients can select external financing as their preferred payment method during tx presentation, and they can fill out a prequalification application right on the same screen to confirm that they're eligible.

Having all of this in a single workflow makes it easier for patients to know their options and get prequalified (with no hit to their credit — it's a soft credit pull) before they ever leave the chair, leading to a much higher likelihood that they'll say YES to tx plans, even the big ones.

8. Let the Awkward Happen

The dentist's office is a difficult place for many people. It requires patients to be vulnerable, and they often come in expecting bad news. There's no getting around it. But if you can deliver bad news empathetically, with compassion and understanding, patients will feel cared for instead of pressured. It takes patience – sometimes a saintly amount of it. But kindness will go farther than pressure tactics in the long run.

9. Get Better with Data

If you're already a wizard at building rapport, educating patients, looking for opportunities, and empathetic conflict resolution...then what?

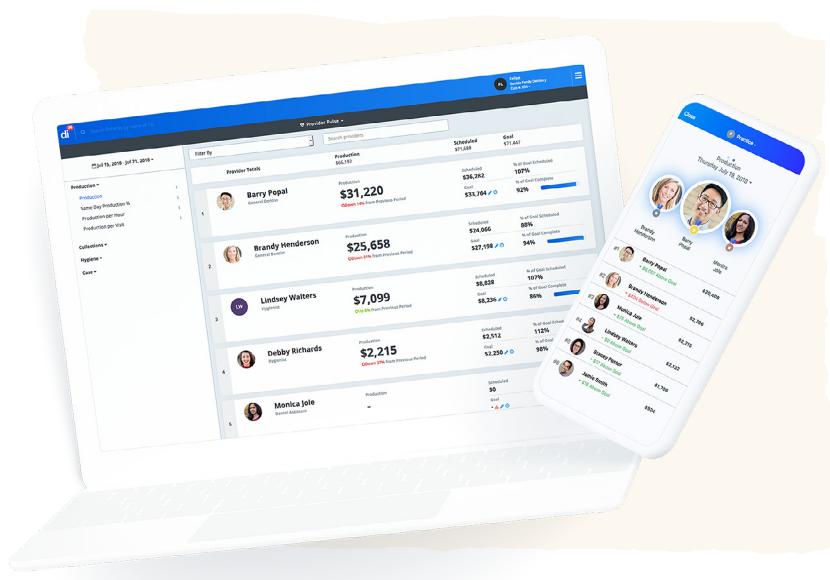
You measure your results in concrete numbers so you can see what's working, what needs to be improved, and what should be thrown out entirely.

If growth is a priority, you must constantly be tracking:

- Production per visit
- Diagnostic %
- Same-day $ Treatment %
- Treatment $ Acceptance %
- Perio Visit %
- AR Days (how long it takes to collect payment)
- And about 247 other things

Data will tell the story that people skills can't. Dental Intelligence's Provider Pulse automatically measures vital metrics so they can be improved every single day. With DI, lower performing providers will learn from top performers, your team gets clarity with real-time data, and you get the insight you need to grow together as a team.

Even if you're not using Dental Intelligence, data will mean the difference between going through the motions and making sure those motions are working in a meaningful way. Dive into the numbers, learn from them, and adjust accordingly.



Learn more about Provider Pulse here.

10. Demystify the Front Desk Experience

How many times has a patient approached the front desk, received a treatment plan, and then given you a deer-in-the-headlights look? That's no good. Here's how you get rid of that.

Present treatment in the chair. If a patient has already signed a tx plan while in the operatory, it's a heck of a lot easier for everyone when they hit the reception desk. The front desk doesn't have to answer clinical questions, or be hit with "is this really necessary?" That's already taken care of.

Same-day scheduling. If a patient leaves without scheduling a follow-up, there's a chance your practice will become out of sight and out of mind. Online scheduling makes it easy to give patients a wide variety of dates and times that will work with their schedules. In Open Dental, **Planned Appointments** makes scheduling even easier. Your back office can create the planned appointment for the recommended tx, and the front desk can put the appointment on the pinboard and into the schedule.

Reinforce front desk competency. If your front desk is equipped to spend time answering questions and addressing concerns all while displaying a reassuring confidence in the practice and its providers, that confidence will be contagious.

11. Follow Up Effectively

So what happens if a patient doesn't schedule before leaving? You **reach out to them in a way that makes them more likely to respond.** That might be text, that might be email, or it might be a phone call. Regardless, it must feel personal, or it runs the risk of being dismissed as another marketing tactic.

Our favorite new way to follow up effectively is with Modento's Voicemail Drops. Your front desk hits a button, and the patient gets a voicemail in their inbox without their phone ever ringing, thus eliminating the pressure of answering an unsolicited phone call.

All you need to do is have the doctor record a generalized message that says something like:

PLAY

"Hi there! This is Dr. Brown, and I'm just calling to follow up on the treatment that we talked about at your last visit. I want to make sure we're getting you and your pearly whites taken care of. So if you have any questions about what we discussed or if you're ready to get it scheduled, just call us at (phone number) or schedule on the website. Take care, and we hope to see you soon! Have a great day!"

Voicemail drops can eliminate thousands of phone calls over the course of a year, and since they come directly from the doctor, they're far more likely to get a response. It's a non-invasive, rapport-building way of encouraging patients to follow through on their treatment.

That's it!

It's a lot to absorb, but you don't have to apply all of these tips in one day. One victory at a time is enough, so long as you consistently, intentionally incorporate more of them over time. Do this, and your case acceptance can only go up.

Want to learn more about any of the tools mentioned in this ebook? Schedule a demo [here](#) to see how the right tech stack can make treatment conversations 100x easier.

What do practices think of DI?

★★★★★

"Dental Intel has been a wonderful addition to our dental office! In the past 2 months, we have doubled our same-day treatment acceptance, and greatly improved on our morning huddle! I highly recommend Dental Intel to other colleagues!"

Grand Oaks Dental

★★★★★

"With the combination of fewer available appointments and the heightened requirements to protect patients and team members, we made sure patients understood it would be far better to complete more treatment in a single visit. This has led to much more same-day dentistry and has increased our PPV significantly."

Dee for Dental

★★★★★

"What DI did that was so unique was to bring all of those key metrics – the actionable data that matters – into an intuitive, real-time dashboard, that allows me to now know exactly what the 'big rocks' are that I need to move, and in which order. This is more than data – DI provides me with insights that turn the lights on to my practice. It's easy to feel really busy and think 'We're doing great!' and to then be shocked when you review your P&L and see what's happening. DI gives you live metrics vs. just giving you a scorecard after the game was played."

Dr. Craig Spodak