

Guidelines for Effective Patient Conversations



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Conflict of Interest Disclosure Statement

- Dr. Levin reports no conflicts of interest associated with this course. He has no relevant financial relationships to disclose.

Short Description

Learn about the Guidelines for Effective Patient Conversations. This free continuing education course seeks to review the concept of Guided Conversations and why effective communication with patients is so critical to the management systems that allow practices to operate efficiently and effectively.

Course Contents

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Overview

This course will introduce the concept of **guided conversations** and why effective communication with patients is so critical to the management systems that allow practices to operate efficiently and effectively. The concept of guided conversations (sometimes referred to as scripting), while not new, is effectively integrated into only a minority of practices. The course will outline the reasons guided conversations should be used with patients and how to implement them and train the team. All doctors and team members can improve their communication skills, and thereby practice performance, by understanding the psychological factors involved with creating the proper communication guidelines for every patient conversation and how that will improve patient cooperation and results.

Learning Objectives

Upon completion of this course, the dental professional should be able to:

- Understand how guided conversations can improve every patient interaction.
- Identify the obstacles to using scripts in the dental practice.
- Review a sample guided conversation for the new patient phone call and understand what makes it effective.

Introduction

Dental practice success is directly proportional to the quality of the operational systems in place. Those systems determine how tasks are conducted day-to-day. They allow the dental team to work with great efficiency and speed and achieve desired results. Operational systems consist of a series of steps to be followed that allow for the most efficient process and also function as an educational and training opportunity for the team.

Practices with excellent operational systems often perform better than others, but there is one other factor when designing operational systems that can make a significant difference in how effective those systems are – adding **guided conversations** (previously referred to as scripts) to the systems. The concept of guided conversations is not new in dental practice management, but it is one that has often been ignored, or once implemented, gradually declines in regular use. Although dentists have learned and implemented guided conversations (in the form of scripts) as part of the implementation of better systems for years, it is only a small percentage of practices that actually use them. There are multiple reasons that will be discussed in this course, as to why guided conversations are either never implemented or implemented and then gradually ignored. Properly designed and implemented guided conversations for all the operational systems will result in the practice operating at peak efficiency and profitability.

Why Guided Conversations?

The first question that should be asked is why guided conversations are so important, especially in light of the fact that the concept is so rarely used or maintained. Guided conversations are about communication and are a large part of how dental practice systems are implemented and carried out at maximum effectiveness. Having systems means that each team member will know the steps to be taken to complete a task, but for many of those steps and tasks, patient communication is an essential component of making the system work. Consider this example:

Every dental practice has to collect money. Whether it is a fee for a service or a copayment as part of an insurance policy, the practice will inevitably have to ask patients for payment. Patients should pay the balance due at the time of the service. If the patient is fee-for-service, they would pay the entire fee and if they are an insurance-based patient, they would pay their estimated copayment. This systematic approach was put in place many years ago to improve dental practice collections, as billing for services after-the-fact often resulted in patients not paying their balances in a timely manner or at all.

As part of the collection system, front desk team, or financial coordinators must ask patients to pay their balances while they are in the office. This is where the system reverts from an internal series of steps to patient communication. How the patient is asked to pay the balance has a direct effect on how effective the system actually is. Here are two examples of ways to ask a patient to pay their balance:

1. "Mrs. Jones, would you like to pay your balance today?"
2. "Mrs. Jones, how would you like to pay your balance today, cash, check, or credit card?"

Let's examine this simple example of a guided conversation. In the first script, which is quite common, the patient is being asked if they would like to pay their balance today. Many patients answer that they would not like to pay their balance today and ask to be billed or tell the practice they will pay it when they come back for the next visit. People often don't want to pay their balances, worry about their credit card maximums, don't have a cash or check with them, or expect that dental practices should be paid the balance at the time of the service, as is the policy of the practice in this case, but not properly communicated in script number one above.

Script number two gives the patient options, but not an option to not pay the balance. Script number two informs the patient that the balance is due now and they have an option of paying by cash, check, or credit card. This script can be delivered as a guided conversation with excellent customer service in a positive manner and tone to help maintain excellent relationships with patients.

Script number one often results in patients leaving the office without having paid their balance, which means that the collection process will now have to take place and some of these balances will be difficult to collect or not collected at all. Script number two collects the balance right away and eliminates any need for further collections, while giving the patient an option of how they would like to pay. Eventually script number two will have to be expanded for digital payments and should already include the use of debit cards.

The difference between script number one and script number two highlights the incredible power of guided conversations. The truth is that script number one above was not technically a script, in that it wasn't designed and documented. It is simply documentation of what was said by many front desk team members or financial coordinators in dental practices that were never trained in the right way to collect payment at the time of the service. In their mind, they were asking patients to pay the balance, but the language used communicated that the patient did not have to pay the balance and had the option of either being billed or paying the balance at some other time. Script number one was simply what team members said to patients trying to be nice and complete a specific collection task.

Script number two above is a real script. It was designed to collect money at the time of the service, eliminate unnecessary time and effort, and have a higher than acceptable collection rate. Once again, this simple but very real example is critical to properly carrying out the collection system in a dental practice.

Guided conversations transform everyday comments or conversations into highly effective communication. Effective scripts are designed with precise psychology to accomplish an extremely specific task, such as collecting balances at the time of service, while still providing friendly and excellent customer service, and communication.

Reasons Why Guided Conversations are Frequently Not Used

We established that most dentists have heard about guided conversations (scripting) and have a sense of why it can be valuable. Yet, it remains highly unused in most practices. What are the reasons behind this?

1. The practice does not have excellent systems in place. Guided conversations are an adjunct to excellent systems and excellent systems may be the number one factor in overall practice success. If practice systems have not been put in place, then scripting will not be overly beneficial. Many practices that have one, two or three scripts that are occasionally

used, and then forgotten. However, very few embed the concept of guided conversations into their overall operations to be used in many situations relative to patient communication. When practices do not have systems in place, it is difficult to help the team understand where and when to use a guided conversation, and in most cases, the suggested scripting will either be nonexistent or fall off quickly when attempts are made to implement it into the practice.

2. Scripts for guided conversations are hard to write. Writing scripts for guided conversations is not as easy as sitting down and throwing a few words or sentences together on a piece of paper. It is a psychological development process to facilitate excellent communication with patients to achieve a specific result. When the practice is attempting to schedule a patient, collect money, present a large case, or help a patient understand why dental insurance does not cover all services, a guided conversation can help to make that specific task successful and understood. Once again, practices with excellent scripting have better results because patients are more cooperative. Once they understand why something needs to happen and what the practice policies and protocols are, they become very receptive.

3. The team members believe they will sound robotic. This is one of the most common reasons for resistance against using guided conversations in the practice. We have heard both doctors and team members explain that scripting would make them robotic and impersonal. This could not be farther from the truth. Scripting will enhance your communication skills greatly, but you still need to bring your own personality. This fear is often due to team member resistance to taking the time to learn the scripts and implement them into regular usage. The fact is that many of the team members who claim that scripting will make them seem robotic, have never used scripts or seen the benefit of results in communication. This is an example of the human nature of simply not wanting to change and then rationalizing the reasons why. Another possible reason for this resistance is that team members and doctors overestimate their communication skills and do not feel that they really need

scripting for their conversations with patients. However, scripting makes systems work better and increases practice productivity and results with patients.

4. We had scripting, but we no longer follow it. There are many practices that have tried to implement guided conversations. They may have implemented it successfully at the start but eventually stopped. Why doesn't this idea hold long-term? Because guided conversations takes more effort and focus, and busy team members often revert back to just talking to patients rather than using the psychologically designed scripting that is so powerful and beneficial.

All systems have a danger of certain steps falling off. In most practices, there are specific steps that will not fall off, such as asking for payments, filing dental insurance, and using automated confirmations for patients. But these are just pieces of systems and practice performance will not reach its potential unless complete scripting is in place to guide the conversations with every patient.

Sample Conversation and Key Insights

For the next part of this course, we are going to review a sample script for a guided conversation with a new patient calling the practice. This guided conversation is particularly important because it is essential to build a powerful relationship with a new patient caller. First, the conversation will be presented in its entirety and then commentary is provided about what you are reading in the suggested scripting. Also, this may seem exceedingly long as you read it. Keep in mind this is a template, and it takes place much faster in real time than it seems when reading it, and you can also modify it to fit your office specific protocols.

New Patient Guided Conversation

Scheduling Coordinator: Good afternoon, thank you for calling Smith Family Dental. This is Julie speaking. How may I help you?

Patient: Oh, hi Julie, my name is Shelley and I'm calling to see if I can get an appointment.

Scheduling Coordinator: Well, that's great! Thank you so much for calling Shelley. I'd be happy to schedule an appointment for you. When was your last visit to our practice?

Patient: Oh, I'm a new patient. I haven't been to your practice before.

Scheduling Coordinator: Well, welcome! You've made an excellent choice. I'm one of our New Patient Coordinators, so I'll be able to help you with everything you need. Let me start first by confirming your callback number in case we get disconnected for any reason.

Patient: Ok, sure. The number is 555-444-1212.

Scheduling Coordinator: Thank you, Shelley. Let me just ensure I have the correct number. I have 555-444-1212. Is that a cell phone number?

Patient: Yes, that's my cell. That's the best number to use to reach me.

Scheduling Coordinator: Now, Shelley, may I ask who we can thank for referring you to us?

Patient: Yes, Lucy Jones. She spoke very highly of you all. Our kids go to the same school.

Scheduling Coordinator: Oh, that's wonderful! We love seeing Lucy and her family. I'm so glad she told you about us, and I'll certainly be sure to thank her the next time we see her.

Dr. Smith and our team are truly excellent at what they do. Not only do they provide awesome dental care, but they make our patients feel comfortable and enjoy their experience at every visit.

Let's go ahead and get you scheduled for an appointment. Dr. Smith reserves time in his schedule specifically for new patients, and your initial visit will consist of a comprehensive new patient examination in which Dr. Smith will get to know you and your particular oral health needs and goals. Our new patients really appreciate the time Dr. Smith takes to focus on them individually. We reserve an hour for these appointments and have time available on Thursday at 1:20 PM or next Tuesday at 10:00 AM. Which of these is more convenient for you?

Patient: I'll take Tuesday at 10:00 AM.

Scheduling Coordinator: Wonderful. I've got that time reserved for you. Now, Shelley, do you have any particular areas of concern right now that you'll want Dr. Smith to address?

Patient: No, nothing in particular. I just haven't been to see a dentist in a few years since I left the office I used to go to.

Scheduling Coordinator: Well, you've made an excellent decision to get reconnected with a dental practice, and we appreciate that you chose us. At Smith Family Dental, we consider your health and safety a #1 priority in our practice. We have always followed the strictest infection control guidelines of the American Dental Association and the Centers for Disease Control and will continue to do so as regulations change in order to keep you safe. Is that about when your last dental hygiene appointment was?

Patient: Yes, about 2 or 2 ½ years ago

Scheduling Coordinator: Well, we're going to take wonderful care of you. Now do you have any additional family members we can get scheduled today as well?

Patient: Oh, that would be great. My husband and three kids will need appointments too.

Scheduling Coordinator: Wonderful. We love it when we get to meet the entire family. How old are your children?

Patient: They are 6, 8, and 10.

Scheduling Coordinator: Well, Dr. Smith and our team are great with kids, and we do all kinds of fun things in the office just for them. In fact, if you check out our Facebook page, you'll see some photos of our most recent activities.

Now, for your children's first visit, they'll be seen by one of our registered dental hygienists and Dr. Smith will conduct a full examination as well. We have found that our families have the best experience when we schedule no more than three appointments on the same day. This helps prevent too much wait time for each child and ensures you're able to be present during each child's treatment. We do have two appointments available on Tuesday when you come in. Shall I go ahead and reserve time for two of your children on that date or would you prefer to schedule the three of them together?

Patient: You know what, let's do my appointment first and then we can do the kids on a different day. I think what I'll do is plan to schedule those when I come in next week. I just realized I need to look at the kids' sports schedules to coordinate around that, so I'll bring them with me when I come in.

Scheduling Coordinator: Perfect. Now, let me get some additional information to ensure that we're fully prepared for your visit. Let me start by getting your last name followed by your address.

Patient: It's Johnson, and my address is 223 Spruce Street. Actually, I think we live one street over from your office.

Scheduling Coordinator: Yes you do! How convenient! We are right on the corner of Pine and Elm, so you should have no trouble finding us.

Now, may I have an email address that we may use to communicate with you about your family's appointments?

Patient: Sure. It's johnsoncrew@ email. com

Scheduling Coordinator: Excellent. One of the great services we provide is the ability to receive appointment communications via email and text message. Our patients really appreciate this. With your permission, I'll go ahead and enable you to begin receiving our messages. Typically, you can expect to receive an email message two weeks prior to your appointment and a text message 48 hours in advance.

Patient: That's great. I love being able to get everything on my phone these days.

Scheduling Coordinator: Yes, isn't it convenient? Now, Shelley, do you have dental insurance that you'll be using for your family's care here?

Patient: We do, but I don't have my card on me at the moment. We're with Delta Dental though. It's through my husband's employer. He works at the hospital.

Scheduling Coordinator: That's no problem. I can follow up with you later today or tomorrow to get that information. We are considered in-network with Delta and our Financial Coordinator, Janelle, will work with you to ensure that you get the maximum reimbursements to which your plan entitles you.

So, Shelley, let me tell you what will happen next. By the end of the day today, you'll receive an email from Dr. Smith. In it you'll find a link to our website where you can access all kinds of valuable information about our practice. You can also complete and submit your new patient forms right through our website, which will ensure that we have all the additional information we need to be prepared for your visit next week.

Patient: Fantastic.

Scheduling Coordinator: So, are there any additional questions I can answer for you, Shelley?

Patient: Well, I'm sure I'll see it on your website, but does Dr. Smith do whitening? I've been thinking about it for myself.

Scheduling Coordinator: He sure does. In fact, we have a few different whitening systems available, and as part of your examination, Dr. Smith will evaluate whether you're a good candidate for whitening and talk with you about what options may work best.

Patient: Great, thanks so much.

Scheduling Coordinator: My pleasure! Thank you again for calling, Shelley. Dr. Smith and our entire team will be looking forward to seeing you on Tuesday at 10:00 AM. Have a great weekend.

Essential Elements of Guided Conversations

Let's begin by understanding certain parameters of scripting for guided conversations.

• **Guided conversations should always be positive.** The purpose of holding a guided conversation is to gain patient cooperation, but like all systems, it should also be geared toward creating a perception of excellent customer service. In most cases, these conversations are about helping a patient to cooperate with the

practice in everyone's best interest. In this case, it is an opportunity to have a patient leave the new patient phone call with an intense sense of relationship of the office, and an excellent perception of how enjoyable the visit will be. This occurs because the front desk coordinator follows a script that allows them to show gratitude, get to know the patient and instill in the patient that she is available to be of help in any way.

• **Use positive language in the conversation.**

You will note in the example script that there are many positive words. The purpose of the positive words, or Power Words, is to create a positive sense of energy, which creates trust. All patient conversations should have one or more Power Words included in order to communicate to the new patient caller that the practice is delighted to have them as a new patient, will provide excellent customer service, and will show them that it that can be trusted.

• **Build a relationship.** As mentioned above, one of the goals of the guided conversation is to build a relationship with a patient, not just get the basic information. Taking time to get to know the patient, sharing some personal information, and letting the patient know that he or she will be treated extremely well will go to the heart of building excellent relationships.

• **Endorse the doctor and practice.** As you will note, there was wording in the script that builds the image of the doctor and a sense of trust. Very few team members take the time to take this step during the new patient call; however, it can tremendously advance the relationship and trust factor with the new patient. One might argue that this is not necessary as they will meet the doctor when they come in, but they are a percentage of patients that are never actually scheduled and a percentage of new patients that do not keep the appointment. Building this type of endorsement and trust in the new patient phone call will go a long way toward advancing the practice – patient relationship.

• **Give the details clearly.** As the conversation plays out, there are patients that get confused about the time of the appointment because they have looked at several different options. Make

sure patients fully understand the details of their appointment. This avoids miscommunication and lost time and revenue for the practice.

- **Build the image of the practice as being advanced and leading-edge.** Patients want to believe that they are making an appointment in an excellent practice where they will be treated with the best dentistry possible. Emphasize this during the new patient phone call so that they will feel that they are joining a high-end practice with advanced technology and treatments.

- **Make your final comments count.** This is the chance to review the details of the conversation. Letting a patient know you are glad that they called, reminding them of your name, informing them they can contact you if they have any questions and that you are looking forward to meeting them all create a powerful ending to the new patient phone call.

Summary

The main purpose of guided conversations is to advance the effectiveness and efficiency of the practice systems. Systems are the key to

success in any dental practice, and the level of success will usually be directly proportional to the quality of the systems. However, adding scripting to facilitate guided conversations with patients will help them to be more cooperative, which will enhance both practice operations and patient relations. All practices should have guided conversations for every system, with some systems requiring multiple scripts, as necessary.

Guided conversations not only create a perception of trust and good customer service, but by encouraging patient cooperation with practice systems and protocols, they help to save time and effort. The conversations alone can increase practice production significantly by eliminating waste of time that can be used more effectively for other practice opportunities.

Do not underestimate the power of guided conversations. Even dentists, who often think they do not need it, can benefit greatly. There are few other practice opportunities that can accomplish so much through the addition of one strategic concept.

Course Test Preview

To receive Continuing Education credit for this course, you must complete the online test. Please go to: www.dentalcare.com/en-us/ce-courses/ce703/start-test

1. Why is the concept of guided conversations important?

- A. It allows team members to practice their memorization skills.
- B. Guided conversations are about communication and improve the results from the practice management systems that operate the practice.
- C. It saves the team from needing to think about what they are doing or saying.
- D. Insurance companies require it for certain reimbursements.

2. Which of the following two choices is the better script?

- A. "Mrs. Jones, would you like to pay your balance today?"
- B. "Mrs. Jones, how would you like to pay your balance today, cash, check, credit card?"

3. What is the best example of how guided conversations are effective?

- A. Not everyone speaks the same language.
- B. They help patients to physically hear better.
- C. Guided conversations transforms everyday comments or conversation into highly effective communication.
- D. You never want to use the same word twice in communication.

4. Why does the dental team often stop using scripts for patient communication?

- A. It becomes easier to revert back to the faster and simpler way of saying things.
- B. They have difficulty learning the scripts.
- C. Team members don't like the way the scripts are written.
- D. Team members are not worried about whether or not patients will cooperate.

5. Which is NOT true when writing scripts for guided conversations?

- A. Easy and anyone can do it.
- B. Makes a conversation more effective and professional sounding.
- C. A process to facilitate excellent communication with patients.
- D. Are hard to write and not as simple as throwing a few words down on paper.

6. Why do many dentists and team members resist scripting?

- A. They are afraid they will sound robotic.
- B. Most team believe they naturally and innately communicate better than the scripts.
- C. They don't like using big words.
- D. Scripting does not sound fun.

7. A practice only needs Guided Conversations for...

- A. Collections.
- B. Only administrative systems.
- C. All systems, but only one script per system.
- D. All systems, with multiple scripts per system, as necessary.

8. Which is the most important reason to have a new patient script?

- A. It is essential to build a powerful relationship with a new patient caller.
- B. You want them to always come in at a time convenient to the practice.
- C. New patients always know everything before the call takes place.
- D. New patients already know what they want and what they need.

9. Which is TRUE when developing a guided conversation?

- A. Be sure to include negative information, so the patient will trust you.
- B. Always be positive in the language.
- C. Use complex words so patients think you are smart.
- D. Just tell the patient what you want them to do.

10. Which best describes the importance of final comments in a guided conversation?

- A. Unimportant because you have already told them everything.
- B. Given quickly to get the patient out of the office or off the phone.
- C. An excellent opportunity to review the details of the conversation.
- D. Usually forgotten by the patient.

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Additional Resources

- Levin Group

About the Authors



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Dr. Roger P. Levin is the CEO of Levin Group, a leading dental management consulting firm. Founded in 1985, Levin Group has worked with over 30,000 dental practices. Dr. Levin is one of the most sought-after educators in dentistry and is a leading authority on dental practice success and sustainable growth.

Through extensive research and cutting-edge innovation, Dr. Levin is a recognized expert on propelling practices into the top 10%. He has authored 65 books and over 4,000 articles on dental practice management and marketing.

Dr. Levin sits on the editorial board of 5 prominent dental publications and has been named as one of the “Leaders in Dentistry” by Dentistry Today magazine for the last 15 years. He was recently named one of the “32 Most Influential People in Dentistry” by Incisal Edge magazine and voted Best Dental Consultant by the readers of Drbicuspid.com. He has been featured in the Wall Street Journal, New York Times, and Time magazine and is the creator of the Levin Group Tip of the Day which has over 30,000 subscribers.

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