

EP.9 How to Close (and Not Close) Treatment

Surveys show that your hygienists are trusted by 81% of patients, and your assistants by even more than that!

Often times your clinical team may not have the confidence to do this, so it is up to you to convey to your clinical team leaders what you want them to feel empowered to do.

How to Close Treatment:

- 1. Intraoral camera** – shows the patient the treatment they need and creates a sense of urgency.
- 2. Digital xrays** – show the suspicious areas compared to healthy.
- 3. Hand-off** – this is where the ball gets dropped the most!

Why is the handoff so important? People have to hear something 7 times to take action. The handoff is an opportunity for the patient to hear it again and it builds trust between the patient and team.

How Not to Close Treatment:

- 1. Don't ask, "Did you want to schedule?"** Be aware of Same Day opportunities in your schedule in advance. Also, by putting treatment off until another day, the sense of urgency is lost.
- 2. Don't be the sole educator**-- empower your team to "prime the pump" and prepare the patient for your evaluation. By determining if that patient "needs a lot of facts" or "just wants the bottom line", they can handoff to you based on that knowledge. Don't blow it by over-educating.
- 3. Not having someone follow-up on all unscheduled treatment.** If the patient wants to "talk it over" with a spouse, send them home with an Intraoral Camera picture and ask permission to follow up and make sure that someone does.

Meet with your team and go through the tools they are using to educate the patient on treatment. Evaluate your current handoff template and use it every time. Review your verbal skills to get them scheduled.